



## Gifting Securities, Mutual Funds and Cash

Transferring securities, mutual funds and cash to Sacred Heart Academy is quick and easy. By doing so you can reduce your capital gains taxes on securities and minimize taxable income. The instructions below can be provided to your financial institution in order to make a transfer. We will provide you with a substantiation letter to use for tax purposes.

### Transfer Instructions

#### Securities/Mutual Funds Transfer:

- Participant ID: 2039
- Agent Bank ID: 94952
- Institutional ID: 94952
- Agent Internal A/C: The Philadelphia Trust Company.; #11075-C
- FFC: Sacred Heart Academy: #PTC767

#### Cash Transfer:

- Firsttrust Bank
- ABA: #236073801
- A/C#: 070-0302219
- Credit: The Philadelphia Trust Company
- FFC: Sacred Heart Academy

#### Provide Sacred Heart Academy with the following information

- Donor name
- Name of security or mutual funds
- Number of shares
- Expected Date of transfer

#### *Send information to:*

Robin Nolan  
Sacred Heart Academy Bryn Mawr  
610-527-3915 Ext. 223  
[robin.nolan@shabrynmawr.org](mailto:robin.nolan@shabrynmawr.org)