



**Episcopal  
Relief & Development**

Healing a hurting world

[www.er-d.org](http://www.er-d.org)

## Stock Gift Instructions

In order for us to process your gift properly, please fill out this form and return it to:

**Episcopal Relief & Development, 815 Second Avenue, 7th Floor  
New York, NY 10017, Attention: Donor Records**

**Phone: 800.334.7626 ext. 5129 Fax: 212.687.5302 Email: [er-d@er-d.org](mailto:er-d@er-d.org)**

- 1) Your name: \_\_\_\_\_
- 2) Address: \_\_\_\_\_  
\_\_\_\_\_
- 3) Telephone: \_\_\_\_\_
- 4) Email: \_\_\_\_\_
- 5) Broker name (if applicable): \_\_\_\_\_
- 6) Broker telephone: \_\_\_\_\_
- 7) Email: \_\_\_\_\_
- 8) Name of stock: \_\_\_\_\_
- 9) Number of shares: \_\_\_\_\_

10) Approx. dollar amount: \_\_\_\_\_

11) Area of designation: \_\_\_\_\_

To transfer the stock, have your broker contact Episcopal Relief & Development's broker at:

Merrill Lynch, Pierce, Fenner & Smith  
717 5th Avenue, 5th Floor  
New York, NY 10022  
DTC: 5198  
Acct: 5MW-02008  
Financial Advisors: Luppino/Eschenauer Group  
Contact: John Cullinan  
Phone: 212.415.7619  
Fax: 212.553.2009

**Note:** If you are sending actual certificates, they should be accompanied by a stock power letter, and sent to Episcopal Relief & Development using a courier service that can provide a tracking number.

*\* It is important to provide the above information to Episcopal Relief & Development prior to a stock transfer. The stock wiring message does not include donor information, and we will be unable to properly credit your gift. We appreciate your assistance in this matter.*

**To mail a security certificate:**

- If you are sending an actual security certificate, please write a letter to Episcopal Relief and Development giving us permission to transfer the ownership of certificates. Either you or your broker may write this letter.
- Before mailing the actual certificate(s), be sure to sign each one exactly how your name appears on the document. Make sure to have a Signature Guarantee to endorse the transfer by asking your bank to stamp a medallion signature certification ensuring the authenticity of your signature.
- Next, mail the certificate(s) to Episcopal Relief & Development. The certificate must be accompanied by a stock power letter (one for each certificate) giving us ownership of the certificate. Please mail a copy of the original letter which gives us permission to transfer the certificate, along with the certificate and stock power letter.
- Mail your certificate, stock power letter and original letter to the address below.

Episcopal Relief & Development  
ATTN: Donor Records  
815 Second Avenue  
New York, NY 10017