



## STOCK TRANSFER INSTRUCTIONS

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ERS maintains an account at PNC bank for the acceptance of tax-deductible stock donations.

Organization: Episcopal Retirement Services, Inc.  
Tax ID: 31-1570272  
PNC Bank: DTC # 2616  
Acct. Number: 21-70-001-3845386  
Acct. Name: ERH CUSTODY  
Administrator: LUKE HAMPTON, CTFA: (800) 449.7382 [luke.hampton@PNC.com](mailto:luke.hampton@PNC.com)

In advance of transferring the stock gift, please contact Joy Blang, Executive Director of Philanthropy, at (513) 979-2313 or [jblang@erslife.org](mailto:jblang@erslife.org), with the name of the stock, the number of shares to be donated, the intended date of transfer and the name of the bank the stocks will be coming from.

After receiving confirmation of the transfer, ERS will mail you an acknowledgement letter which serves as your tax receipt. Per IRS regulations, the amount of the gift is determined by the average of the high and low values per share on the date of transfer.