CHARITABLE GIVING INSTRUCTIONS

Thank you for considering a gift in support of St. Edward High School (TAX ID #34-0737808).

- IRA Charitable Distributions: Managed by Plan Administrator (Charles Schwab, Fidelity, Vanguard, etc.)
  
  ● Request IRA gift from Plan Administrator
  ● Have IRA gift sent directly to St. Edward High School to receive eligible tax benefit.
  ● Notify the Institutional Advancement Department to provide the purpose of the gift.

Legal name: St. Edward High School
Tax ID number: 34-0737808

Our address and contact information for qualified charitable distribution:

St. Edward High School
Institutional Advancement Department
13500 Detroit Avenue
Lakewood, Ohio 44107
216-221-3776

- DTC Transfer of Stock:

  ● Notify the Institutional Advancement Department to provide the purpose of the gift, name, type of securities and number of shares
  ● To transfer securities to St. Edward High School via DTC, please use the following instructions:

<table>
<thead>
<tr>
<th>Annual Fund Gifts</th>
<th>Capital Campaign Gifts</th>
<th>Endowment Gifts</th>
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<td>Capital Campaign Fund SD</td>
<td>Endowment Fund SD</td>
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</table>

Donor Name & Address: ____________________________________________________________

In order to promptly and accurately credit a security gift to the appropriate donor, it is essential that the transfer instructions include the donor’s name and address. Without this information, we are occasionally unable to identify the donors of certain securities.
-Mutual Fund Transfer:

Mutual fund units cannot be electronically transferred via DTC. The method used to transfer mutual funds to St. Edward High School varies, depending on how the fund units are held:

If your mutual fund is held in an account with the fund company, please contact the business office:

Don Murphy, Vice President of Finance & Facilities
St. Edward High School
13500 Detroit Avenue
Lakewood, OH 44107
dmurphy@sehs.net

-Wire Transfer of Cash:

Please contact the Institutional Advancement Office for information regarding wire transfers.

Acknowledgment of Gift

As soon as a securities gift is received and matched to a donor, the Advancement Office sends an acknowledgment letter stating the nature of the gift, the gift valuation date, and the gift valuation amount.

*Please note: St. Edward High School is an educational institution and does not provide tax, legal, or financial advice. Any document or information shared by our staff is intended to be educational. We strongly encourage donors to seek counsel from their own legal and financial advisors. Please be aware that any information or documents shared by our staff cannot be used to avoid tax-related penalties.*

If your broker requires further information, he or she should contact an Investment Office representative or:

Timothy J. Tomalavage, CFP®
Hirtle, Callaghan & Co.
Five Tower Bridge
300 Barr Harbor Drive, Suite 500
West Conshohocken, PA 19428
Direct: (610) 943-4233 Fax: (610) 828-7425
email: ttomalavage@hirtlecallaghan.com

In order to determine if a security gift is to be an unrestricted gift or a restricted gift for a specific use or purpose, please contact:

Tim Isabella ‘88
(216) 221-3776 Ext. 254 or tisabella@sehs.net

Mail to:
St. Edward High School
13500 Detroit Ave., Lakewood, OH 44107.

Revised-7/29/19