



South Bend Heritage

STOCK GIFTS support South Bend Heritage's mission to enhance the beauty and value of urban neighborhoods and empower residents, through collaboration, physical transformation, advocacy and education.

Thank you for your interest in donating a stock gift to **SOUTH BEND HERITAGE FOUNDATION, INC.** Every gift generates additional investment and opportunity in our community you can see and feel. We truly appreciate your commitment and generosity to South Bend Heritage.

Below, please find the information necessary to supply to your broker in order to make a stock transfer.

Electronic Delivery to:

LPL Financial
DTC #0075
4707 Executive Drive
San Diego, CA 92121
FBO South Bend Heritage Foundation
Account # 6950-6192

Our account manager at Mutual Bank is Mike Portolese at (574) 273-7605 Mike.Portolese@bankwithmutual.com

When the transfer is complete, South Bend Heritage will receive notification of the stock donation within a week. This notification does not include the name of the donor. Written acknowledgements containing tax information can only be mailed to you once South Bend Heritage has received your name and contact information, either from yourself or your broker.

Please note that we give the value of the donation on the date it is transferred to South Bend Heritage. Your acknowledgment will be based on the average price of the stock on the date it was transferred to our name. The monetary amount received by South Bend Heritage will depend on the actual price upon sale.

If you have questions about South Bend Heritage, our programs, our finances, or the work that we do across the city, please do not hesitate to contact me directly at (574) 289-1066. We appreciate your support and interest in our work.

Sincerely,

Marco J. Mariani
Executive Director

*****Please notify us before you transfer stock to South Bend Heritage's account*****

www.sbheritage.org

Bringing plans to reality for over 40 years.