



SECURITIES TRANSFER INSTRUCTIONS

Gifts of appreciated securities are tax-exempt to the extent allowed by law. Consult your tax advisor for more information. All stock gifts to Montreat Conference Center are sold on the date they are received and are not held.

Transfer securities in two ways:

1. Your broker may electronically transfer ownership of the stock to Montreat Conference Center's account at Merrill Lynch (see account information below).

Please notify or have your broker notify Chloe Duncan, donor records coordinator, at (828) 419-9805, when you have initiated an electronic transfer for donations of stock.

Stock transfers must be initiated by April 15 in order to allow time for processing by Montreat's April 30 fiscal year end.

Give your broker the following information:

Account Name: Mountain Retreat Association (DBA Montreat Conference Center)
Brokerage firm: Merrill Lynch
DTC Number: 8862
FAO Mountain Retreat Association
Account #702-04B42

2. Another option is to mail stock certificates, unendorsed, with a signed stock power (available from your financial services provider), in separate envelopes to:

Montreat Conference Center
Office of Development
PO Box 969
Montreat, NC 28757

If you have any questions, please contact Chloe Duncan, donor records coordinator, at (828) 419-9805 or chloed@montreat.org.