



**Stock Instructions for Gifts to
Mountain Retreat Association
(Doing Business as Montreat Conference Center)
through Merrill Lynch**

1. If your stock is coming from another Merrill Lynch account then supply our account number.
2. If your stock is coming from another firm, have them send to:
 - i. Merrill Lynch
 - ii. DTC 8862
 - iii. FAO Mountain Retreat Association
 - iv. Account #702-04B42
3. **PLEASE CONTACT** Chloe Duncan in the Conference Center Development Office with the stock name, number of shares and how you want your gift distributed (Montreat Fund, Capital Campaign, etc.) **We are grateful for your support and this will assist us in promptly recording and acknowledging your gift.** Chloe can be reached at by email at chloed@montreat.org and by phone at 828-419-9805 or 800-572-2257, Ext. 349.
4. If the gift is in the form of a physical stock certificate you hold and:
 - a) If the stock is in YOUR name, you must sign the back of the certificate and the Letter of Authorization (LOA) exactly as it appears on the front of the certificate. If the certificate is in the name of more than one person, each holder has to sign the certificate and the LOA.
 - b) If the stock is in the name of MOUNTAIN RETREAT ASSOCIATION, have one of our authorized signers (President, Richard DuBose or Chief Financial Officer, Richard Sills) sign the certificate and the LOA.

You can then send the certificate and LOA to Merrill Lynch at:

Merrill Lynch
One North Pack Sq., 2nd Fl.
Asheville, NC 28801

For security purposes, we suggest hand delivery, registered mail, or UPS/FedEx.

For questions, the Montreat Account Manager at Merrill Lynch is Stephen Fusco, 828-258-4415 or 800-937-0224. Fax number is 828-355-5404.

Thank you! The Montreat Development Office Staff

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