



American Heart Association

Stock, Bond & Mutual Fund Donations to AHA Instruction for Donors and Their Brokers

**** The American Heart Association does not accept stock or other interests of tobacco, nicotine-delivery system, or cannabis companies. Any such securities will be returned to the donor. Thank you. ****

If donating Stocks and/or Bonds*:

STEP 1:

Please instruct your broker to transfer the shares to the American Heart Association, Inc. account at Merrill using the following information:

DTC # 8862

Account # 549-02786

Please ask sending broker to include identifying information (i.e. donor name, address, phone number, etc.) in the transfer notes so that we may properly credit your donation. Also, please note that as of August 7, 2017, the DTC number above is new though still belongs to Merrill (account number remains the same).

STEP 2:

Please ask sending broker to email or fax the Stock Gift Notification form below to Merrill so that AHA can identify the gift and send a tax receipt to donor.

**Please notify Cristina Quijano 214-706-1264 or cristina.quijano@heart.org before sending odd lot bonds.*

If donating Mutual Funds:

STEP 1:

Please contact Cristina Quijano at stockgifts@heart.org prior to transferring the mutual fund gift to confirm that the fund is eligible to be received in our account. If we are advised by Merrill that they are not able to accept a fund, AHA will pursue other options to determine if the gift can be accepted.

ACAT Participating firms: Input ACAT transfer directly to AHA's account 549-02786. Please mark the transfer with gift indicator.

Non-ACAT Participating Firms: Mutual fund gifts that can be accepted by Merrill must be transferred to the Merrill house account. Please contact Cristina Quijano at stockgifts@heart.org and provide the ticker and number of shares for the mutual fund.

STEP 2:

Please ask sending broker to email or fax the Stock Gift Notification form below to Merrill so that AHA can identify the gift and send an acknowledgment letter.



American Heart Association

Stock Gift Notification

Donor Name(s)

Donor Address

City

State

Zip Code

Telephone

E-mail

Stock Name and Symbol

Number of Shares

Approximate Transfer Date

Purpose of Gift

Sending Brokerage Firm

NOTES

Please fax or email form to:

Fax: 903-487-0025 Attn to: Maureen Troiano

Email: Maureen.l.Troiano@ml.com
StockGifts@heart.org

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