## **Giving Gifts of Stock:**

1) Stock can be transferred via a DTC account to Rosemont's accounts at LPL Financial

Instructions for the donor are as follows:

## If transferring stock

LPL Financial DTC # 0075 FBO: Rosemont College Account # 1658-9533 Contact Info: Danielle Henry Investment Advisor Representative & Client Service Manager, LPL Financial Lake Trust Financial Life Planning 8661 W Grand River Ave, Suite 200 Brighton, MI 48116 810-229-1959 x403 810-522-9013 direct (810) 229-1949 fax Danielle.Henry@laketrustplanning.org

## Mutual Fund Instructions via LPL Financial:

LPL Financial DTC # 0075 FBO: Rosemont College Account # 1658-9533

The stock is valued according to the average of the high and low on the date the stock is received and multiplied by the number of shares being donated.

For more information or questions, contact Helen Sciubba at 610.527.0200 ext. 2232 or email <u>hsciubba@rosemont.edu</u>.