

1300 19th Street NW, 8th Floor
Washington, DC 20036



800.519.1541
www.oceanconservancy.org

Donating Gifts of Mutual Funds to Ocean Conservancy

It is important to complete the form at the bottom and return to Ocean Conservancy as **no donor information** is transmitted with a transfer of mutual funds. By completing this form you will help us quickly identify and acknowledge your gift.

Our policy is to sell the mutual fund shares upon transfer, making the proceeds immediately available to create evidence-based solutions for a healthy ocean and the wildlife and communities that depend on it.

Transfer of Mutual Funds

Please share the following information with your broker-dealer so they can initiate a transfer of mutual funds:

Funds must be delivered via Non ACAT to:

DTC: 0671

Broker: Merrill Lynch

Omnibus Account: 5JX07001

Please email Robel Hailu and Leslie Hulewicz for fund account number requests to:

rob.j.hailu@bofa.com and Leslie.Hulewicz@bofa.com

Credit Fund Account Number _____

For Further Credit to Ocean Conservancy (Tax ID #23-7245152)

For Further Credit to Account # 45-16-026-1809383

Donor Details

Please complete the information below and return it to Ocean Conservancy.

To: Holly Winters

Ocean Conservancy

1300 19th Street NW

8th Floor

Washington, DC 20036

Phone: (202) 351-0457 Email: give@oceanconservancy.org

Donor Name: _____

Address: _____

Telephone: _____ Email: _____

Name of Mutual Fund: _____ # of Shares: _____ Expected Value: _____

Brokerage/Investment Firm: _____

Thank you for your support!