



Inspiring a lifetime of Great Lakes curiosity, stewardship, and passion in people of all ages

Stock Transfer and Delivery Directions

Thank you for your gift!

For your convenience, we have established an agency account with Merrill Lynch. Before you initiate the transfer or if you have questions regarding these instructions, please contact or have your broker/money manager contact:

Kelly Lulis, Wealth Management Associate
Merrill Lynch
Harbor View Centre
333 West Grandview Parkway, Suite 300
Traverse City, MI 49684
Telephone: 231-922-6816
FAX: 231-922-3338
e-mail: Kelly_lulis@ml.com

The following information is necessary to ensure a smooth transfer process:

- Donor's Name
- Number of Shares and Issue Expected
- Date Transfer Will Be Initiated
- Name and Phone Number of Contact at the Transferring Institution

For DTC Eligible stocks and bonds - Deliver FREE in the following manner:

Merrill Lynch
Participant Number: 8862
Customer Name: Inland Seas Education Association
Account Number: 24B-04178

For U.S. Government Securities and Federal Book items, please follow these instructions:

ABA Number: 084301767 – Bank of America
For Further Credit to: 24B-04178
For Further Credit to: Inland Seas Education Association

Your thank you letter will include the stock name, number of shares transferred, date of sale, price per share on that date, and total value of donation (including any fees we pay to the broker).

We appreciate your support of Inland Seas Education Association!