



Office of Institutional Advancement

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## **HOW TO GIVE SECURITIES TO THE COLLEGE OF SAINT ELIZABETH**

**First, please contact Tanya Sorce, Director of Annual Fund, at [tsorce@cse.edu](mailto:tsorce@cse.edu) or 973-290-4465 with stock information and when the gift is being made to the College.**

**Then, please follow the instructions below:**

### **When stock is held by a brokerage firm or commercial bank:**

Instruct your broker or banker to electronically transfer shares of stock directly into the College of Saint Elizabeth's account held at Merrill Lynch. Our broker at Merrill Lynch is Gerald Dowling. His contact information is as follows:

Telephone: 908-719-6416

Email: [Gerald\\_dowlingJr@ml.com](mailto:Gerald_dowlingJr@ml.com)

Deliver to the following: College of Saint Elizabeth  
Account#: WCMA-6JL-02211  
DTC#: 5198  
Tax ID#: 221529785

### **When stock is held in certificate form:**

Please have the certificate re-issued as follows:

College of Saint Elizabeth  
2 Convent Road  
Morristown, NJ 07960-6989  
Tax ID#: 221529785

Then deliver or send the certificate of stock by certified or registered mail. A stock power, properly executed, should be sent separately. Both should be forwarded to the following:

Attn: Tanya Sorce  
Annual Fund  
College of Saint Elizabeth  
2 Convent Road  
Morristown, NJ 07960-6989

**For other transfers, please contact Tanya A. Sorce, Director, Annual Fund, at 973 290-4465 or [tsorce@cse.edu](mailto:tsorce@cse.edu).**