



Cash Gift and Securities Transfer Instructions

To make a **Cash Gift Transfer**, transfer to:

Bank of America
100 West 33rd Street
New York, NY

C/O Merrill Lynch

ABA# **026009593**
Account # **6550113516**

(If International wire add: SWIFT-BIC: BOFAUS3N)

For further credit:

Merrill Lynch Account #: **433-04236**
Name on Account: **Holistic Management International, Bank of America N.A. Agent of**
 The Holistic Management International
Tax ID: **85-0324203**

To make a transfer of **MARKETABLE SECURITIES (Stocks, bonds, mutual funds, etc):**

Notify your financial advisor of your need to transfer securities to HMI and provide them with the following:

Merrill Lynch
Deliver via DTC 5198

Merrill Lynch Account #: **433-04236**
Name on Account: **Holistic Management International**
Tax ID: **85-0324203**

Please notify HMI you are making a gift so we may appropriately recognize your gift as well as place it in the fund you designate. Without such notice, gifts may be transferred to the HMI with the identity of the donor unknown, making proper credit and timely acknowledgement extremely difficult. If you have any questions please contact our office at (505)842-5252 or by email hmi@holisticmanagement.org.