

## GIFTS OF STOCK TRANSACTION FORM

Thank you for making a gift of stock to Saint Mary's Home of Erie. When received by Saint Mary's, this form will be understood to confirm your intent to make a present gift of stock to Saint Mary's. Please complete this form and mail it to Saint Mary's with each gift.

Saint Mary's Home of Erie • Development Office • 607 East 26th Street • Erie, PA 16504-2813

Donor Name(s) \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

I would like this gift of stock to be directed to (please check):

- |  |   |
|--|---|
| <input type="checkbox"/> Area of Greatest Need | <input type="checkbox"/> Saint Mary's East            |
| <input type="checkbox"/> Benevolent Care Fund  | <input type="checkbox"/> Saint Mary's at Asbury Ridge |
| <input type="checkbox"/> The Gallagher Center  | <input type="checkbox"/> Other _____                  |

Transaction Date: \_\_\_\_\_

Stockbroker Name: \_\_\_\_\_ Stockbroker Telephone: \_\_\_\_\_

Stock Name: \_\_\_\_\_ Number of Shares: \_\_\_\_\_ Approximate Gift Value: \_\_\_\_\_

\_\_\_\_\_  
*Donor Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Telephone Number*

Please provide your stockbroker with the following information:

**DTC # 5198**

**Merrill Lynch | Pierce, Fenner & Smith Inc. | 510 Cranberry Street | Erie, PA 16507 | (814)461-6010**

*For credit to: Saint Mary's Home of Erie. Account # 811 04000*

Thank you for your support. You will receive a tax receipt for your records once the stock has been received.

**If you have any questions, please call Anthony Allegretto, Director of Marketing and Development, at (814)451-1316.**

Sponsored by the Sisters of St. Joseph of Northwestern Pennsylvania, Saint Mary's Home of Erie is non-discriminatory in admissions, services and employment. Please note: a donation to Saint Mary's Home of Erie, a 501(c) (3) organization, is purely voluntary and is tax-deductible to the fullest extent allowed by law. A contribution is not a requirement for employment; a business relationship or continuation of an existing business relationship; or a requirement for admission, expedited admission or continued stay at Saint Mary's Home of Erie. All residents will receive the same standard quality care notwithstanding any donations or contributions received. If you wish to have your name removed from the mailing list to receive future fundraising materials supporting Saint Mary's Home of Erie, please send your request to [optout@stmaryshome.org](mailto:optout@stmaryshome.org); Saint Mary's Home of Erie, Development Office, 607 East 26th Street, Erie, PA 16504; or call (814) 528-0194. FLORIDA #CH 32789: A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. Kansas: The official registration and annual financial report of Saint Mary's Home of Erie is filed with the Kansas Secretary of State. Kansas Registration # 449-331-8. Maryland: A copy of Saint Mary's Home of Erie's financial report is available by calling Saint Mary's Home of Erie at 814-451-1308 or writing to 607 East 26th Street, Erie, PA 16504. For the cost of copying and postage, documents and information filed under the Maryland charitable organizations law can be obtained from the Secretary of State, Charitable Division, State House, Annapolis, MD. Mississippi: The official registration and financial information of Saint Mary's Home of Erie may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement by the Secretary of State. New Jersey: Information filed with the Attorney General concerning this charitable solicitation may be obtained from the Attorney General of the State of New Jersey by calling 201-504-6215. Registration with the Attorney General does not imply endorsement. New York: A copy of the latest annual report may be obtained from Saint Mary's Home of Erie, or the Charities Bureau, Department of Law, 120 Broadway, New York, NY 10271. The official registration and financial information of Saint Mary's Home of Erie may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1(800)732-0999. Registration does not imply endorsement. Virginia: A financial statement is available from the State Division of Consumer Affairs. Washington: Our charity is registered with the Secretary of State and information relating to our financial affairs is available from the Secretary of State, toll free for Washington residents 800-332-4483. West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement. Consult with the IRS or your tax professional regarding tax deductibility.

