

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 the 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 – please explain _____ | |

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 Kim McCaslin, CFRE, Director of Development, at (814)836-5312.

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. 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 is purely voluntary. A contribution is not a requirement for employment; the formation of 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 regardless of 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 a written request to: Saint Mary's Home of Erie, Development Office, 607 East 26th Street, Erie, PA 16504.

