

2-STEP PROCESS FOR MAKING A CHARITABLE GIFT WITH STOCK

STEP 1

Please notify the St. Mary's contact listed below with the stock name and number of share(s) being donated:

Evangelina Auclair, Development Officer
St. Mary's Home for Children
420 Fruit Hill Avenue
North Providence, RI 02911
401-353-3900 x262 or cell 508-930-8663
eauclair@smhfc.org

Due to security regulations, there are no individual names associated with a broker account on a stock gift, therefore, it is essential that you notify us first so we may properly thank and credit you for your generous donation.

STEP 2

Please notify the Northeast Investment Group contact listed below with the stock name and number of share(s) being donated and being transferred into St. Mary's account:

Kelly C. Almonte
Northeast Investment Group
1000 Chapel View Boulevard, Suite 200
Cranston, RI 02910
401-213-8318
kelly@northeastinvestmentgroup.com

St. Mary's Federal Tax ID: 05-0213340
St. Mary's account number: F9C-003582
DTC Number: 0226

Important Information

All securities must be transferred into St. Mary's name prior to being sold; otherwise, the donor will be responsible for paying capital gains tax on the appreciated asset(s). You or your Advisor must notify St. Mary's and Northeast Investment when you are making a transfer. Due to security regulations, there are no individual names associated with an account on a stock gift, therefore it is essential that you notify us so we may properly thank and credit you for your generous donation.