

2019 Middlesex Hospital Stock Transfer Instructions

Thank you for inquiring as to how to make a gift of stock to Middlesex Health. Securities held in a brokerage account may be transferred electronically into our account at Merrill Lynch.

Please provide your broker to transfer the shares to:

First Clearing DTC# 8862 (Merrill Lynch)

Acct# 5VZ-02139

Account title: Middlesex Health Systems

Our representative at Merrill Lynch:

Philip Gottlick, Senior Financial Advisor

Merrill Lynch, Pierce, Fenner, & Smith Inc

71 Bradley Rd, Suite 2

Madison, CT 06443

Tel: 203-318-3713

Fax: 203-437-4651

Philip_Gottlick@ml.com

When making your gift, it is very important to notify the Development Office in advance with the following information: your name and address, the name of the security and number of shares you are contributing. This is because when shares are transferred broker to broker, only the stock name and the number of shares are communicated, and not the donor's name. Advance notice enables us to immediately identify your stock as a gift from you and acknowledge your generosity for tax purposes.

Sally Ann Lee

sallyann.lee@midhosp.org

Direct line – 860-358-4065

Fax – 860-358-6568

Revised May 2019