

Middlesex Health 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 Middlesex Health's account at Essex Financial Services.

Please provide your broker with the following information:

- **Wire to:** J.P Morgan Chase Bank, NY
- **Address:** One Chase Manhattan Plaza, New York City, NY 10005
- **ABA Number (routing number):** 021000021
- **For credit to:** National Financial Services, LLC, 499 Washington Blvd, Jersey City, NJ 07310
- **Account number:** 066196-221
- **For benefit of Middlesex Hospital Attn: Office of Philanthropy**
- **For Further Credit:** 645-714080

Our representative at Essex Financial Services:

Michael R. LaRiviere, Financial Advisor

176 Westbrook Road, Essex, CT 06426

(860) 767-4300

(860) 767-4310 Fax

michael.lariviere@essexfinancialservices.com

When making your gift, it is very important to notify the Philanthropy Office in advance with the following information: your name, address, and 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.

**Please note: While our brand is now Middlesex Health, our legal name remains Middlesex Hospital.*

Sally Ann Lee

sallyann.lee@midhosp.org

Direct line – 860-358-4065

Fax – 860-358-6568

Revised March 2021