



Dear Friends:

Thank you for contacting Essex County Habitat for Humanity about a gift of stock. Donors should be advised to communicate, in advance, with Essex County Habitat about the gift they plan to make.

If you are transferring securities that are currently held by your brokerage firm, please provide them with the following information:

Merrill Lynch  
DTC Participant # 8862  
FAO: Essex County Habitat for Humanity  
Account #: 82E-04004

This will allow your brokerage firm to properly transfer the gift to our brokerage firm account.  
If you would like to donate a physical certificate of stock, please see below:

- Contact Daniel Klug (see below for contact information) for instructions and required documents. This way they can inquire exactly how the certificate is registered and provide specific instructions and paperwork to the donor(s). They will send the donor the stock power and Authority to Deposit form pre-populated with the right information, so they do not alter the stock power or sign incorrectly.

\* The donor may choose to assign a partial number of shares to Essex County Habitat rather than the full shares listed on a certificate.

**Note:** New industry procedures require the balance of shares must be delivered out electronically to a direct registration/book-entry account in donor's name and Tax ID number at the security's Transfer Agent. Physical certificates can be requested from the Transfer Agent, but this may not be available in all cases.

Questions may be addressed to:

Daniel Klug, CRPC®  
Wealth Management Specialist - RDA  
Ferrante, Kavanagh & Hurst Group  
Merrill Lynch, Pierce, Fenner & Smith Inc.  
200 Brickstone Sq. Ste 402, Andover, MA 01810  
978-623-7512 |

Sincerely,

A handwritten signature in cursive script that reads "Kevin J. Hudson".

Kevin J. Hudson  
Director of Charitable Giving