
WELLSPRING/KARITAS STOCK GIVING INSTRUCTIONS

You can electronically transfer a gift directly to our Janney account as follows:

- DTC # 0374 to Wellspring/Karitas Account #: 543-98-974
- Janney Montgomery Scott LLC
- 1767 Sentry Parkway West, Suite 110, Blue Bell, PA 19422
- Contact at Wellspring/Karitas
 - Sandy Forbes – 54sandyjo@comcast.com
- Contact at Janney Montgomery Scott LLC:
 - Michael Patitucci III – 215.619.3915, MPatitucci3@Janney.com

Please note, it is important that you (or your broker) alert Wellspring/Karitas via PHONE: 215.869.1880 or E-MAIL: 54sandyjo@comcast.com to notify us of your incoming gift and to provide your mailing address, as the stock will arrive without identification. Without this information we are unable to issue a tax receipt.

Once your stock gift is processed, a tax receipt will be mailed out stating the name of the stock, the number of shares, and the date it was received by Wellspring/Karitas. Your tax advisor should determine the value of the gift.

Wellspring/Karitas' Employer Identification number is 23-2176303.

The concepts illustrated here have legal, accounting and tax implications. Neither Janney Montgomery Scott LLC nor its Financial Advisors give tax, legal, or accounting advice. Please consult with the appropriate professional for advice concerning your individual circumstances.

Patitucci Wealth Management of Janney Montgomery Scott LLC

1767 Sentry Parkway West, Suite 110, Blue Bell, PA 19422

215.619.3915 | MPatitucci3@Janney.com