

How to Donate Stock to the Chase Home, Inc.

You may be able to reduce your federal capital gains taxes by donating appreciated stock and securities directly to the Chase Home, Inc. If you are ready to make a gift of stock to Chase Home, Inc., please follow the instructions below and give your broker the following information:

Account Name: Chase Home, Inc.

Tax ID Number: 52-0613676

Maryland Charitable Organization Registration Number: 2054

DTC Number: 0015

Morgan Stanley Account Number: 675-900010-003

Morgan Stanley Brokerage Representative: Caitlin Johnston, Portfolio Associate

Phone: (410) 295-5871

Email: Caitlin.Johnston@morganstanley.com

Chase Home, Inc. Representative:

Heather East, Executive Director

Phone: (410) 263-2723

Email: heather@chaselloydhouse.org

Please give your broker permission to release your name and contact information to Chase Home, Inc. so that we may acknowledge you properly. Without your name, we will have no way of knowing where this generous gift came from. (If you wish to be marked as an anonymous donor in our donor publications, you or your broker may make this request.)

Your broker should notify the Chase Home, Inc. of the expected stock gift by calling (410) 263-2723 or emailing the Executive Director Heather East at heather@chaselloydhouse.org.

Upon receipt of the stock transfer, Morgan Stanley will send a confirmation to Chase Home, Inc. confirming the gift date and the high and low trading price on the day of transfer. The gift value will be recognized as the average of the high and low trading price, and the gift date will be documented as the date of the electronic transfer.

The Chase Home will send you an acknowledgement letter based on the information provided by Morgan Stanley, which will include share prices used to value the gift.