

# Roman Catholic Diocese of Baton Rouge

## STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. The Diocese of Baton Rouge maintains a brokerage account with Morgan Stanley for the purpose of processing stock transfers to the Diocese for the benefit of the Diocese or any of its parishes, schools, or agencies. The Diocese can not initiate stock transfer on your behalf. You must contact your broker directly.

### PLEASE PROVIDE ALL INFORMATION REQUESTED:

#### NOTICE OF STOCK DONATION:

Name: \_\_\_\_\_ Parish: \_\_\_\_\_

Address: \_\_\_\_\_  
(Street) (City) (State) (Zip)

Phone: \_\_\_\_\_ (work) \_\_\_\_\_ (home)

Name of stock and shares donated: \_\_\_\_\_

Please apply my gift towards: (ABA, Offertory, Capital Campaign, Parish, School, Etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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If securities are electronically transferred, the gift date is the date the securities enter our account at Morgan Stanley. For hand-delivered securities to Morgan Stanley, the gift date is the date received. If the securities are mailed to the Diocese, the gift is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Morgan Stanley has instructions to sell stock as soon as possible (usually by the business day following their receipt of stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceed applied from the gift. The Diocese can not be responsible for any variance in these amounts.

#### A. ELECTRONIC TRANSFER BY BROKER

- Please communicate the following information to your broker.

To: \_\_\_\_\_  
(Broker's Name & Company)

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock from my  
Account \_\_\_\_\_ to:

**Morgan Stanley**  
**Stephen Taylor – 225-379-7549**  
**Roman Catholic Church of the Diocese of Baton Rouge**  
**ACCOUNT #784-013831**  
**DTC #0015**

**I / We hereby authorize the above stock transfer:**

\_\_\_\_\_  
(Signature) (Date) (Signature) (Date)

#### Please send a copy to:

Stephen Taylor ([Stephen.Taylor@morganstanley.com](mailto:Stephen.Taylor@morganstanley.com)) or Natalie Koehl ([Natalie.Koehl@morganstanley.com](mailto:Natalie.Koehl@morganstanley.com))  
400 Convention Street, Suite 400  
Baton Rouge, LA 70802  
225-231-3100/Fax 225-237-3105