

# DONATING STOCK

Dear Parishioner:

For most people there are favorable tax consequences available to you for donating appreciated stock directly to Saint Luke's. Moving the stock directly to Saint Luke's allows you to take a full tax deduction on the value of the stock at the time of the donation regardless of acquisition cost. This means you avoid the costs of selling stock and there are no taxes to pay on the capital gains. Please consult your tax advisor to ensure this works for your personal tax situation.

## HOW TO GIVE STOCK:

1. Instruct your broker to **transfer** the stock directly to Saint Luke's account at Morgan Stanley. The DTC transfer information and account information you or your broker will need to do this is

DTC # 0015

Morgan Stanley

Account #: 106 130782

FBO Saint Luke's Episcopal Church

### **Do not sell the stock!**

2. Complete one of the attached forms. The first form can be used in most cases. The second form is used only when your broker requires a written authorization.
3. FAX the form you complete to Saint Luke's at (408) 354-4066.

## WHAT HAPPENS:

1. Your brokerage firm will send a confirmation of the transfer to you. Keep this for your tax records.
2. When the stock is received, Morgan Stanley sends a confirmation of the stock sale to Saint Luke's. This confirms the sales date and the price, and usually occurs within 5-7 business days.
3. Morgan Stanley sends a check with the proceeds to Saint Luke's within 3 business days after the sale has cleared.
4. Saint Luke's sends an acknowledgement letter of your stock donation to you along with a copy of the sales confirmation statement from Morgan Stanley. Keep these additional documents for your tax records.

Stewardship in this way provides benefits to you and to Saint Luke's. We thank you for your gifts and support. Please contact the church office for clarification or assistance.

Saint Luke's Episcopal Church

## Notice of Stock Donation / Transfer

To: Saint Luke's Episcopal Church

Attn: Finance Administrator / Treasurer

**FAX: 408-354-4066**

Date: \_\_\_\_\_

This serves as a notice that a transfer of \_\_\_\_\_ (number) shares of  
\_\_\_\_\_ (name or symbol) stock was completed via DTC from my  
\_\_\_\_\_ (name of firm) brokerage account to:

DTC # 0015  
Morgan Stanley  
Account #: 106 130782  
FBO Saint Luke's Episcopal Church

Please contact me if there are questions about this donation and transfer.

Sincerely,

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Donor Phone Number

\_\_\_\_\_  
Donor Printed Name

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor City, State, ZIP

**Notice of Stock Donation / Transfer  
Transfer of Stock - Written Authorization**

Date: \_\_\_\_\_

Dear \_\_\_\_\_ (Broker)

Please use this letter as authorization to transfer \_\_\_\_\_ (number) shares of  
\_\_\_\_\_ (name or symbol) stock from my account, with  
account number \_\_\_\_\_ .

Please send shares via DTC to:  
DTC # 0015  
Morgan Stanley  
Account #: 106 130782  
FBO Saint Luke's Episcopal Church

If you have any questions, you may contact the Morgan Stanley broker for Saint Luke's,  
Ryan Seay, at 408-947-3717.

Sincerely,

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Donor Phone Number

\_\_\_\_\_  
Donor Printed Name

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor City, State, ZIP

**FAX CC: Saint Luke's Episcopal Church, (408) 354-4066**