



**INSTRUCTIONS FOR TRANSFER OF STOCK  
FROM A DONOR'S BROKERAGE ACCOUNT  
DIRECTLY TO THE CATHOLIC CHARITIES BROKERAGE ACCOUNT**

If a donor wishes to transfer shares from a personal brokerage account to the account of the Catholic Charities Corporation, the donor must convey the following information to their broker:

Broker:	Morgan Stanley	
Account Name:	Catholic Charities Corporation	
Account Number:	613-120301-017	
DTC Routing #:	0015	
Contacts:	Cheryl Hartman	<a href="mailto:Cheryl.L.Hartman@morganstanley.com">Cheryl.L.Hartman@morganstanley.com</a> 717-519-4948
	Gregory Luscher	<a href="mailto:Gregory.Luscher@morganstanley.com">Gregory.Luscher@morganstanley.com</a> 717-519-4945

***Please call or email Cathy A. Brown at 216-696-6525 x2940, [cbrown@catholiccommunity.org](mailto:cbrown@catholiccommunity.org) with your name, address, name of stock, and number of shares to ensure accurate, prompt processing and acknowledgement of your gift.***

Per IRS rules, the value of the gift will be determined upon the date the stock is transferred into the Catholic Charities Corporation's account.

**INSTRUCTIONS FOR TRANSFER  
OF A STOCK CERTIFICATE  
HELD IN A DONOR'S NAME**

To donate a stock certificate held in your own name, a Stock Power Form and a Security Release Form will be sent for your notarized signature to complete the gift transfer.

Per IRS rules, the value of the gift will be determined as of the notarization date of all properly executed forms.



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CATHOLIC COMMUNITY  
FOUNDATION

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