



Rooted in Faith Forward in Hope

Strengthening the Catholic Church in Northeast Ohio

**INSTRUCTIONS FOR TRANSFER OF STOCK FROM A DONOR'S
BROKERAGE ACCOUNT DIRECTLY TO THE
ROOTED IN FAITH – FORWARD IN HOPE BROKERAGE ACCOUNT**

If a donor wishes to transfer shares from a personal brokerage account to the account of ***Rooted in Faith – Forward in Hope***, the donor must convey the following information to their broker:

Broker:	Morgan Stanley	
Account Name:	Rooted In Faith – Forward In Hope	
Account Number:	613-120305-017	
DTC Routing #:	0015	
Contacts:	Cheryl Hartman	Cheryl.L.Hartman@morganstanley.com 717-519-4948
	Gregory Luscher	Gregory.Luscher@morganstanley.com 717-519-4945

Please call or email Cathy A. Brown at 216-696-6525 x2940, 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 ***Rooted in Faith – Forward in Hope*** 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.



CATHOLIC COMMUNITY
FOUNDATION