

## **TRANSFER INSTRUCTIONS FOR STOCK DONATIONS**

**Thank you for considering a stock donation to the Diocese of Columbus.**

**If a donor physically has the stock certificate (s):**

A. The stock certificate(s), an executed stock power, and a letter of authorization (see attached) may be delivered/sent certified to the Diocesan Finance Office at:

**The Diocese of Columbus  
Finance Office  
197 East Gay Street  
Columbus, Ohio 43215  
(614) 224-1221**

**OR**

B. You may send by registered mail, your unsigned stock certificate(s), an executed stock power and a letter of authorization (sample enclosed) to the Diocesan Finance Office, at the address indicated above.

**OR**

C. You can deliver your stock certificate, an executed stock power, AND LETTER OF AUTHORIZATION to your Parish Office, **who in turn will forward to the Finance Office.**

**If the stock certificate(s)or shares are held by a brokerage firm or financial institution, this information will be needed.**

1. The broker for the Diocese of Columbus is:

**Morgan Stanley  
Joseph Bettendorf  
41 S. High Street, Suite 2700  
Columbus, Ohio 43215 (614) 229-4983**

2. The "DTC" number for Morgan Stanley is **0015**.

3. The official name of the Diocesan Account at Morgan Stanley is:

**Catholic Diocese of Columbus  
FBO Diocese of Columbus**

4. The Diocesan Account Number is **362-067749**

5. Please ask your broker to note on the transfer how the stock is to benefit the Diocese.  
(Example: Parish Name, Appeal, etc.)

**NOTE: You will need to supply a Letter of Intent to the Diocese Finance Office (enclosed) so that information can be received concerning the stock gift into the diocesan account and to make sure you are credited with your stock gift.**

**Make sure your full name, address and parish name appear on the Letter of Intent. Please call 614-224-1221 should you have any further questions. Thank you.**