

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 can also avoid the costs of selling stock and taxes you might 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 for use when your broker requires a written authorization.
3. FAX the form you complete to Morgan Stanley at (408) 998-2633.
4. FAX the same form you complete also 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. The FAX you sent to Morgan Stanley informs them to sell the stock immediately after it arrives, usually in 2-3 business days. Without this notification they will not know the stock transfer is in process.
3. Morgan Stanley sends a confirmation of the stock sale to Saint Luke's confirming the sales date and the price, usually in 5-7 business days.
4. Morgan Stanley sends a check with the proceeds to Saint Luke's within 3 business days after the sale has cleared.
5. 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 may provide benefit to you and 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: Morgan Stanley, 333 W. San Carlos St, Ste 1100, San Jose CA 95110
(408) 286-6060 FAX: 408-998-2633

Attn: Ryan Seay
(408) 947-3717

FAX: 408-998-2633

Date: _____

RE: Saint Luke's Episcopal Church

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:

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

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

FAX CC: Saint Luke's Episcopal Church (408) 354-4066
Attn: Financial Administrator

**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:

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

Physical shares can be sent registered mail to:

Morgan Stanley
FBO Saint Luke's Episcopal Church
333 West San Carlos Street, Suite 1100
San Jose, CA 95110

If you have any questions, you may contact the Morgan Stanley broker for Saint Luke's,
Ryan Seay, at 408-947-3717 or Morgan Stanley at 408-286-6060.

Sincerely,

Donor Signature

Donor Phone Number

Donor Printed Name

Donor Street Address

Donor City, State, ZIP

FAX CC: Morgan Stanley, (408) 998-2633

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