



The Catholic Foundation
Planning Your Legacy



Stock Transfer **Gifts**

With a gift of stock you can support the work of the Catholic Church in the Diocese of Lansing and enjoy valuable tax benefits. Simply transfer stock of appreciated value directly to The Catholic Foundation.

A Great Source for Major Gifts!

If you wish to make a larger gift to The Catholic Foundation, you can make a tax-wise gift with a transfer of stock rather than tapping into your cash accounts this year.

Avoid Capital Gains Tax

If you transfer stock of appreciated value directly to The Catholic Foundation, you will not have to pay capital gains tax on the appreciated value of the stock that you may be obligated to pay if you were to sell the stock. That's a real tax advantage for a charitably minded stock owner who doesn't want to pay capital gains taxes.

READY TO MAKE A STOCK TRANSFER GIFT? IT'S EASY, JUST FOLLOW THESE STEPS!

1. **Direct** your broker to transfer a gift of stock to The Catholic Foundation at:

Account Information

Name:	The Catholic Foundation of the Diocese of Lansing
DTC #:	0015
Account #:	395-015775-043
Federal Tax ID #:	81-2025056

Receiving Broker

Morgan Stanley, Perrone Lewis Group
2900 West Road, Suite 300
East Lansing, MI 48823

Contacts at Morgan Stanley

Stephen Perrone/Jennifer Edwards
517.324.8008 or 800.248.0487

2. **Notify** The Catholic Foundation of your stock transfer gift intention:

Donor Name
Address
Preferred Phone & Email

Name of Security
Number of Shares
Anticipated Date of Delivery
Gift Designation (e.g., Parish name, DSA, Witness to Hope, endowment fund)

The Catholic Foundation Contact:

Matt Hufnagel, Vice President of Development 517-253-8748 or mhufnagel@dioceseoflansing.org

This information is not intended as tax, legal, or financial advice. Consult your personal financial or tax advisor for information specific to your situation. If you plan to give units of a mutual fund, please allow two weeks for your gift transaction to be completed.