



## Gifts of Appreciated Stock

### Background:

Parishioners may contribute appreciated shares of stock or mutual funds to the Parish to manage their capital gains tax liabilities.

The Parishioners' brokers need specific information to transfer the asset / shares to the parish, but it's a fairly straight forward **two step process**:

### Step I

**Provide the following information about St Mary Parish to your broker:**

Account Name:	St. Mary Congregation, Inc.
Brokerage Account number:	303-109436-021
Brokerage:	Morgan Stanley
DTC#:	0015

St Mary's investment advisor:

David J. Lownik, CIMA  
Senior Investment Management Consultant  
First Vice President  
Email : [David.J.Lownik@morganstanley.com](mailto:David.J.Lownik@morganstanley.com)  
Phone: 414-226-3116 Direct  
Fax: 414-226-3081  
Toll Free: 800-558-7505

### Step II

**Advise the Parish of the details of your gift.** The Parish needs to know the correct account titling of the donor to provide proper acknowledgement. For example, are the securities in question titled in the name of a trust, corporation, jointly or individually, etc.? We also need to know the number and type of shares being transferred. It is very rare for the sending broker to include the name of the donor in the transmission of shares. At the Parish we receive notice of shares transferred, so we need your help to properly match up the donor with the gift.

Parish Contact:

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