



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

<b>Name:</b>	The Catholic Foundation of the Diocese of Lansing
<b>DTC #:</b>	0015
<b>Account #:</b>	395-015775-043
<b>Federal Tax ID #:</b>	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	Name of Security
Address	Number of Shares
Preferred Phone & Email	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](mailto: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.