

## **Holy Innocents' Episcopal Church**

### **How to Make a Stock Donation**

1. Give this information to your broker:

The Holy Innocents' Episcopal Church account information is:  
Brokerage: Morgan Stanley Smith Barney  
Financial Consultant: Kristen Fricks-Roman  
Kristen's Assistant: Liz Carpio (email) [liz.carpio@smithbarney.com](mailto:liz.carpio@smithbarney.com)  
Telephone Number: 404-459-3821/404-705-6500  
Fax Number: 404-459-3838  
Email: [Kristen.fricksroman@smithbarney.com](mailto:Kristen.fricksroman@smithbarney.com)  
Holy Innocents' Account Number: 556-213754-125  
DTC Number: 0015

2. Please email me at [cfleming@holyinnocents.org](mailto:cfleming@holyinnocents.org) or call me at 404-255-4023 x 105 and let me know the name of the stock and number of shares traded so I can follow up with our broker. Also I will need to know how you want the amount applied to your pledge. (i.e. your annual pledge, capital campaign, next year's pledge, etc).
3. Your broker will make the transfer. You will be credited the average of the high and low for the day the stock is transferred into our account.
4. I will follow up with a letter to you stating the stock sold, # of shares and how it was applied to your pledge. This will be for income tax purposes.

I hope this helps. If you have any questions, please do not hesitate to contact me for clarification.

Sincerely,  
Caroline Fleming  
Office Manager & Registrar  
404-255-4023, ext. 105  
[cfleming@holyinnocents.org](mailto:cfleming@holyinnocents.org)

