

Holy Innocents' Episcopal Church

How to Make a Stock Donation To The Church

1. Give this information to your broker:
The Holy Innocents' account information is:
Brokerage: Morgan Stanley Smith Barney
Financial Consultant: Kristen Fricks-Roman
Kristen's Assistant: Liz Carpio (email) liz.carpio@mssb.com
Telephone Number: 404-459-3821/404-705-6500
Fax Number: 404-931-9797
Email: Kristen.fricksroman@smithbarney.com
Holy Innocents' Account Number: 556-213754-125
DTC Number: 0015
2. Please email me at gnnblack@holyinnocents.org or call me at 404-255-4023 x 102 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,
Ginny Black
Financial Administrator