

**St. Paul's Episcopal Church
Cleveland Heights, OH**

Steps for Completing Gifts of Stock

1. If your broker holds the stock shares, you have two choices: your broker can sell the stock directly and send a check to St. Paul's, made out to St. Paul's, or, have the stock transferred directly to St. Paul's Morgan Stanley Account.
 - a. Instruct your broker, in writing, of the shares you wish to give to St. Paul's, and send a copy of the letter to St. Paul's.
 - b. To complete an electronic transfer of stock, your broker needs St. Paul's DTC Number and Morgan Stanley Account Number. Have your broker call Brenda Burton at St. Paul's to receive this information and to inform St. Paul's of the pending transfer (see #3 below).

2. If you hold the certificate:
 - a. Deliver or send by registered mail the UNENDORSED CERTIFICATE to St. Paul's. Include a letter stating that you are giving the stock to St. Paul's and for what purpose.
 - b. SEPARATELY, deliver or send a stock power, signed exactly as your name appears on the stock certificate. Stock powers can be obtained from St. Paul's, your broker, or your bank.

3. Information your broker may need:
 - a. St. Paul's DTC Number, #0015
 - b. St. Paul's Morgan Stanley Account Number - #305-013036-013
 - c. EIN# - 34-0714744
 - d. St. Paul's Episcopal Church
2747 Fairmount Blvd.
Cleveland Heights, OH 44106
Attn: Brenda Burton, Controller
Telephone: 216-932-5815, EXT. 217
Fax: 216-932-8257

4. Morgan Stanley Stock Transfer Contact Information:
 - a. Morgan Stanley Smith Barney
Broker: Henry Ott-Hansen
Work: 216-523-3111

Please remember – **do not sell the appreciated stock before making your gift.** Transfer the appreciated stock directly to St. Paul's and the church will complete the sale. That way your gift is tax deductible.