

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

Address: 5565 Glenridge Connector, Suite 1900,
Atlanta, GA 30342

Financial Consultant: Kristen Fricks-Roman

Kristen's Assistants: Liz Carpio (email) liz.carpio@mssb.com

Or Megan McMillan (email) megan.mcmillan@mssb.com

Telephone Number: 404-459-3812/404-705-6500 (main number)

Fax Number: 404-935-9797

Email: Kristen.fricks-roman@mssb.com

Holy Innocents' Account Number: 404-37342-11

DTC Number: 0418

2. Please email Ginny Black at gblack@holyinnocents.org call her at 404-255-4023 and let her know the name of the stock and number of shares traded so she can follow up with our broker. Also she 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. Ginny 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,

Susan Farrell

Parish Administrator, Holy Innocents' Episcopal Church