Stock Donation form
Charlotte Catholic High School
2025-26 Capital Campaign

STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer or by physical certificate. The Diocese of Charlotte maintains a brokerage account with Morgan Stanley for the purpose of processing electronic transfers to the Diocese for the benefit of the Diocese or any of its parishes, schools, or agencies. The Diocese cannot initiate stock transfers on your behalf. You must contact your broker directly.

Acknowledgement

☐ I understand that the Diocese cannot initiate stock transfers on my behalf. I must contact my broker directly.

PLEASE PROVIDE THE FOLLOWING INFORMATION AND FORWARD TO:

Stock Gifts
stockgifts@rcdoc.org
1123 South Church St
Charlotte, NC 28203
(704) 808-4523 (p) (704) 370-6930 (f)

Alison Fey
AAFey@charlottecatholic.org
7702 Pineville-Matthews Rd
Charlotte, NC 28226
(704) 716-2451

Stock Donation Information

Donor Name: _____ Affiliation/Parish: _____

Address: _____
(Street) (City) (State) (Zip)

Phone: _____ Email: _____

Name of Stock to be Donated: _____

Number of Shares: _____ Date: _____

Method of Donation

- ◯ Electronically
- ◯ Physical Certificate

Please direct my donation to: Charlotte Catholic High School 2025-26 Capital Campaign

If securities are electronically transferred, the acknowledgment date is the date the securities enter our account at Morgan Stanley. For hand-delivered securities to the Diocese or Morgan Stanley, the acknowledgment date is the date received. If the securities are mailed to the Diocese, the acknowledgment date is the date received. Within ten days of processing your gift, an acknowledgment letter that complies with IRS regulations will be sent.

Morgan Stanley has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. The Diocese can not be responsible for any variance in these amounts.

INSTRUCTIONS FOR ELECTRONIC TRANSFER BY BROKER

Please communicate the following information to your broker:

To: _____
(Brokers name & Company)

Please transfer _____ shares of _____ stock from my account

_____(enter account number) to:

Morgan Stanley
Roman Catholic Diocese of Charlotte
Account # 767-104790
DTC# 0015

I / we hereby authorize the above stock transfer:

_____ _____
(Signature) (Date) (Signature) (Date)

INSTRUCTIONS FOR DIRECT DONATION OF CERTIFICATE

If the certificate is titled in the name of the donor:

1. Sign the certificate
2. Include a "letter of intent" with your name, address, stock, shares, and intent (Charlotte Catholic High School - 2025-26 Capital Campaign) with your signature and date.
3. Send by registered mail (or deliver) to the Diocese and deliver to a Morgan Stanley office.
4. Send a copy of the completed first page of these stock donation instructions to the Diocese.

If the certificate is titled in the name of the Diocese:

1. send by registered mail (or deliver) to the Diocese, with the completed completed first page of these stock donation instructions .

Please send copies of this completed form to the following:

Stock Gifts
stockgifts@rcdoc.org
1123 South Church Street
Charlotte, NC 28203
704-808-4523 (p) 704-370-6930 (f)

Alison Fey
AAFey@charlottecatholic.org
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Thank you

for supporting
Charlotte Catholic
High School