



## GIFTS OF STOCK AND SECURITIES

There are many ways to make a gift in support the Archdiocese of Newark. A gift of stock and securities can benefit you in two ways: you may receive a charitable income tax deduction for the full fair market value of the securities, while avoiding capital gains taxes on appreciated stock.

In order to make a gift of securities, please alert us in advance.

**\*Gifts cannot be properly acknowledged or designated without advance notice of who is making the gift, its designation, and the number of shares being transferred.\***

A wire transfer can be made through the Depository Trust Corporation (DTC) to our brokerage account. You will need the following information:

**DTC#:** 0015

**ACCOUNT:** Roman Catholic Archdiocese of Newark Donated Securities Account

**ACCOUNT #:** 036-893206

**HELD AT:** Morgan Stanley Wealth Management  
1030 Broad Street, 3<sup>rd</sup> Fl  
Shrewsbury, NJ 07702

**Attention:** Tyler Gilmour  
(o) (732) 389-5135 | [david.gilmour@morganstanley.com](mailto:david.gilmour@morganstanley.com)  
(732) 544-9070 (fax)

If any additional information is needed and to notify the Archdiocese of Newark of your donation and its designation, please contact:

Matthew Phelan, Director of Banking and Investments  
Archdiocese of Newark  
(973) 497-4069 | [matthew.phelan@rcan.org](mailto:matthew.phelan@rcan.org)  
(973) 497-4083 (fax)

For your convenience, a stock transfer letter template is attached.

## STOCK TRANSFER LETTER TEMPLATE

Broker, Invest Advisor, or Custodian Bank  
Address  
City, State Zip

RE: Account Number \_\_\_\_\_

Dear \_\_\_\_\_,

I/We, \_\_\_\_\_, intend to make a gift of stock to the Roman Catholic Archdiocese of Newark.

Upon receipt of this letter, please transfer from my account \_\_\_\_\_ shares of \_\_\_\_\_ to the Archdiocese of Newark according to their procedures.

For additional questions, you may also contact:

Ivan Arocho, Executive Director of Development  
Archdiocese of Newark  
171 Clifton Avenue  
Newark, NJ 07104  
(973) 497-4332 | [ivan.aroch@rcan.org](mailto:ivan.aroch@rcan.org)

Sincerely,

*Donor Signature*

cc: Ivan Arocho, Executive Director of Development

***Please include the contact information of the broker, banker, or custodian in the letter.***