

INSTRUCTIONS FOR THE DONATION
OF STOCKS OR MUTUAL FUNDS TO
ST. PATRICK'S CATHOLIC CHURCH OR
ST. PATRICK'S CHURCH SCHOOL

1. If you have the stock certificate in your possession you can endorse it and bring or mail it to St. Patrick's Rectory. Otherwise,
2. Contact your stockbroker and instruct him to prepare a **Letter of Transfer** for the stock(s) or funds you desire to donate. Your broker should then mail the **Letter of Transfer** to St. Patrick's broker:

Morgan Stanley Smith Barney LLC
Suite 400
6701 Democracy Blvd.
Bethesda, MD 20817

For deposit to the account of
St. Patrick's Catholic Church
Acct. No. 53J-00206-15-009

3. Upon receipt of the **Letter of Transfer**, the Smith Barney representative will contact your representative to process the transfer.
4. If needed, St. Patrick's Church/School Tax ID # is 52-0847510.
5. The transaction is accounted for and your donation credited at the closing price of the security on the day of transfer, or in the case of stock certificates delivered to us, on the day of deposit with Smith Barney account.
6. St. Patrick's Church/School will acknowledge to each donor the results of the transaction.

Please contact us if you need any assistance or have questions regarding the transfer of stocks or mutual fund securities. (301-924-2284)