



Gifts of Stock

Gifts of stock or other securities are a great way to reduce your tax liability while supporting the work and mission of Catholic Charities of Boston. You may receive a charitable deduction for the market value of the stock at the time the gift is made.

A gift of stock can be a highly effective way to show your support. Donors may choose to make gifts using long-term appreciated stocks due to the potential tax advantages associated with such gifts. Before you make a gift of appreciated securities, consult your financial planner or tax advisor to determine how the potential tax advantages apply to your situation.

To facilitate a stock donation, please refer to the following instructions:

Notification of Donor Intent

The donor or the transferring broker must provide the following information for audit and acknowledgment purposes:

- * Donor's name and complete address
- * Name and number of securities transferred
- * Specific program to which the gift should be directed, if any

Please communicate this information at the time of transfer via e-mail to neeta_beepath@ccb.org.

Electronic Delivery of Stock Donations

Please use the following information to enable your broker to make an electronic transfer of stock:

Brokerage:

Brian F. Miller
Morgan Stanley
53 State Street, 39th Floor
Exchange Place Boston, MA 02109-2804
617-589-3265
brian.miller@morganstanley.com

Account Name:

Catholic Charitable Bureau of the Archdiocese of
Boston, Inc.
(Tax ID # 04-2534041)
DTC Number: 0015
Account Number: 625842027-053

Please remember not to instruct your broker to sell the stock and forward the liquidated proceeds to Catholic Charities. This will put the tax benefits you would receive at risk. For more information, please contact Neeta Beepath, Director of Advancement Operations at 781-380-4783.