



Annual Campaign at Episcopal

everything • everyone • every year

Making a Gift of Stock to Episcopal

Episcopal School of Baton Rouge welcomes gifts of stock. Contributing appreciated securities could be beneficial to you, as you may avoid capital gains tax that could be due if you sold the asset. It also entitles you to a charitable deduction based on the property's current value.

The amount of your contribution will be based on the average of the high and low price of the stock on the day it arrives in Episcopal's account.

For the purposes of calculating your charitable deduction for gifts of stock, please contact your tax or financial advisor.

Instructions for donating securities to Episcopal:

DTC #0015 – Morgan Stanley

Account Number: #784-126768

Contact: Clay Fournoy or Michelle McNicoll, 225.379.7541

Designation: (the donor provides this information)

If you are interested in making a stock gift, the securities are not DTC eligible, or you have any other questions, please contact Katie Thompson, Director of Annual Giving and Stewardship in the Development office at 225.755.2741 or thompsonk@ehsbr.org.

In addition, we ask that you or your broker notify us of the stock and number of shares once the transfer has taken place. Oftentimes securities are transferred without reference to the donor, and this information allows us to identify your contribution and properly acknowledge your contribution.

Thank you!