



### **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 security'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.

Contact your broker, determine the shares to be gifted, and provide him/her the following information for donating the securities to Episcopal:

**Account Name:** Episcopal High School of Baton Rouge

**Tax ID:** 72-0650540

**DTC #:** 0015 (designates Morgan Stanley as receiving brokerage firm)

**Morgan Stanley Account Number:** 784-126768

**Morgan Stanley Contacts:** Clay Flournoy or Michelle McNicoll, 225.379.7541

If the securities are not DTC eligible, or you have any other questions, please contact Katie Thompson, Director of Development at 225.755.2741 or [thompsonk@ehsbr.org](mailto:thompsonk@ehsbr.org).

Once the transfer has taken place, please notify or have your broker notify us of the following:

- Stock-holder's/Donor's name
- Type of stock
- Number of shares
- Purpose/designation of the gifts (e.g. eFund, capital, gift/pledge payment, any restrictions on use of the gift)

Oftentimes securities are transferred without reference to the donor, and providing the information listed above allows us to accurately identify your gift, allocate it to the correct purpose(s) and properly acknowledge your contribution.

Thank you!