

TRANSFER INSTRUCTIONS FOR STOCK DONATIONS

Thank you for considering a stock donation to Bishop Hartley High School.

If a donor physically has the stock certificate (s):

- A. The stock certificate(s), an executed stock power, and a letter of authorization (see attached) may be delivered/sent certified to the Diocesan Finance Office at:

**The Diocese of Columbus
Finance Office
198 East Broad Street
Columbus, Ohio 43215
(614) 224-1221**

OR

- B. You may send by registered mail, your unsigned stock certificate(s), an executed stock power and a letter of authorization (sample enclosed) to the Diocesan Finance Office, at the address indicated above.

OR

- C. You can deliver your stock certificate, an executed stock power, AND LETTER OF AUTHORIZATION to your Parish Office, **who in turn will forward it to the Finance Office.**

If the stock certificate(s) or shares are held by a brokerage firm or financial institution, this information will be needed.

1. The broker for the Diocese of Columbus is:
**Morgan Stanley
Frank Bettendorf
41 S. High Street, Suite 2700
Columbus, Ohio 43215 (614) 229-4983**
2. The "DTC" number for Morgan Stanley is **0015**.
3. The official name of the Diocesan Account at Morgan Stanley is:
**The Bishop of the Roman Catholic Diocese of Columbus
FBO Bishop Hartley High School**
4. The Diocesan Account Number is **362-067749**
5. Please ask your broker to note on the transfer how the stock is to benefit the Diocese. (Example: Parish Name, Bishop's Annual Appeal, etc.)

NOTE: You will need to supply a letter of authorization to the Diocese Finance Office (enclosed) so that information can be received concerning the stock gift into the diocesan account and to make sure you are credited with your stock gift.

Make sure your full name, address, and school name appear on the letter of authorization. Please call Brian Igel (614) 237-5421 ext. 10777 should you have any further questions. Thank you.

STOCK POWER
ASSIGNMENT SEPARATE FROM SECURITY

For value received, I/we hereby sell(s), assign(s), and transfer(s) to

1. _____ shares of the _____ stock of
NUMBER COMMON, ETC.

_____ represented by _____ standing in the name of the undersigned
NAME OF STOCK CERTIFICATE NUMBER(S)
on the books of said Corporation.

2. One bond of the _____ in the principal
BOND ISSUER'S NAME
amount of \$ _____ standing in the name of the undersigned on the books of
CERTIFICATE NO(S)
said Corporation.

The undersigned does (do) hereby irrevocably constitute and appoint Morgan Stanley Smith Barney attorney to transfer the said stock(s), bond, or debenture(s), as the case may be on the books of said Corporation with full power of substitution in the premises.

SIGNATURE DATE

SIGNATURE DATE

ACCOUNT NAME

ACCOUNT NUMBER