

STOCKS

A gift of appreciated stock may entitle the donor to an income tax charitable deduction for the fair market value of the stock on the effective date of the gift and also avoid capital gain tax. In many cases it is more advantageous for a donor to donate the securities to a qualified organization than to sell the securities and donate the cash proceeds. However, we recommend that you consult your tax advisor for additional information.

To Transfer Stock

1. Instruct your broker to transfer shares of stock to the Archdiocese of Omaha using the following information:

Broker: Morgan Stanley

Address: 13625 California Street, Suite 400, Omaha, NE 68154

DTC Number: 0015

Account Name: Catholic Archbishop of Omaha Inc.

Morgan Stanley Account Number: 361-109843

Federal Tax ID (EIN): 47-0376538

2. Call Darrel Giesbrecht, Data Support Office, at 402.558.3100, or email him at djgiesbrecht@archomaha.org, to ensure the archdiocese is aware of your pending stock transfer.