



“What we GIVE is
what we have FROM
The Lord”
1 Chronicles 29:14

Fulfilling Your DSA Pledge Through a Gift of Stock

Thank you for your support of the Diocesan Services Appeal! With a gift of stock, you can support the work of the Catholic Church in the Diocese of Lansing and enjoy valuable tax benefits. Simply transfer stock of appreciated value directly to The Catholic Foundation.

READY TO MAKE A DSA GIFT VIA STOCK TRANSFER? IT'S EASY, JUST FOLLOW THESE STEPS!

1. **Direct** your broker to transfer a gift of stock to The Catholic Foundation at:

Account Information

Name: The Catholic Foundation of the Diocese of Lansing
DTC #: 0015
Account #: 395-015775-043
Federal Tax ID #: 81-2025056

Receiving Broker

Morgan Stanley, Perrone Wolfe Group
2900 West Road, Suite 300
East Lansing, MI 48823

Contacts at Morgan Stanley

Stephen Perrone/Jennifer Edwards
517.203.2880 or 800.248.0487

2. **Notify** The Catholic Foundation of your DSA stock transfer gift intention. Please include the information listed below:

- Donor Name
- Address
- Preferred Phone & Email
- Parish Name
- Name of Security
- Number of Shares
- Anticipated Date of Delivery
- DSA Gift Designation

The Catholic Foundation Contact:

101 S. Washington Square, Suite 620, Lansing, MI 48933

Donor Services

517.253.8792 or donorservices@catholicfoundationoflansing.org

This information is not intended as tax, legal, or financial advice. Consult your personal financial or tax advisor for information specific to your situation. If you plan to give units of a mutual fund, please allow two weeks for your gift transaction to be completed.