

Instructions for Giving Gifts of Stock to Moorings Presbyterian Church

Please consult with your tax advisor regarding the tax impact of any gift decision

A donor who owns appreciated securities may benefit by making a gift of securities to Moorings Presbyterian Church (the Church). The Church is a 501 (c) (3) organization exempt from federal income taxes. As such, donors may avoid paying capital gains taxes, may be able to claim a charitable tax deduction, or both. **Donors should consult with their tax advisor when considering such gifts.**

Transfer Instructions (two methods):

- **Electronic Transfer of Ownership (Preferred Method):** Donors wishing to transfer stock from their personal investment accounts to the Church should obtain a form from their financial advisor or investment services firm and complete it with the information below:
 - **Firm:** Morgan Stanley Wealth Management, **Attn:** Mayra Dominguez
 - **Address:** 928 N. Collier Blvd., 3rd Floor, Marco Island, FL 34145
 - **Phone:** 239-393-2902 or 239-303-2900/ Fax: 239-449-6387
 - **Account Name:** Moorings Presbyterian Church, Inc.
 - **Account Number:** 525-035669-335, **DTC#:** 0015
 - **Donor Name**

Copies of completed forms should be sent to Moorings Presbyterian Church, ATTN: Accounting Administrator, 791 Harbour Drive, Naples, FL 34103 to insure identification and acknowledgement of your gift. Fax # 239-261-8740

- **Paper Stock Certificate Transfer Procedure:** Donors wishing to transfer physical stock certificates to the Church held in their name or the name of their trust should compose a letter to include the following information below:
 - *[Insert donor name]* is/are relinquishing the following shares as a gift to Moorings Presbyterian Church, Inc.:
 - **Name of the Company the Shares are Issued for:**
 - **Number of Shares:**
 - **Title of Ownership:**
 - **If Shares are Restricted, explain:**
 - The letter must include guaranteed signatures from all current owners of the security. A signature guarantee can be obtained from an authorized officer of a bank or trust company, a member of a domestic stock exchange, or another eligible guarantor as defined by Securities and Exchange Commission rules. A notary public cannot provide a signature guarantee.
 - The stock certificate must be completed as follows:
 - On the front upper right-hand margin, write Moorings Presbyterian Church, Inc. account # 525-035669-335.
 - On the back, complete the following:
 - Write the words "Morgan Stanley Wealth Management" on the line that states "...and do hereby irrevocably constitute and appoint _____ to transfer the said stock to the ownership of Moorings Presbyterian Church, Inc."
 - Write the current date on the line that states: "Dated _____."
 - The owner (donor) must sign his/her name(s) the same way that it appears on the front of the certificate. If there is more than one owner, all must sign.
 - Once completed the stock certificates and letter should be mailed or delivered to:
Accounting Administrator, Moorings Presbyterian Church, Inc., 791 Harbour Drive, Naples, FL 34103

For questions, contact:

Erika Arroyo-Tello, Accounting Administrator 239-213-5232