



Gift Stock Transfer Information For Parishes/Schools/Cemeteries Within the Diocese of Manchester

Process & Parish/Donor Responsibilities:

A stock donation from an individual parishioner is most efficiently transferred via Wire Transfer to our Broker. Once received, the proceeds will be forwarded to the parish, school or cemetery along with a stock transaction report containing the fair market value of the stock on the day it was received. The entity receiving the gift will provide the donor with a written acknowledgement that may be used for tax purposes. *When transferring the stock, the donor/broker should provide the name of the parish/school/cemetery and town, the type of stock, number of shares, estimated date of arrival, and restrictions (if any) on the gift.*

Wiring Instructions:

Wire To: Morgan Stanley Smith Barney, LLC
1000 Elm Street, 14th Floor
Manchester NH 03101

Account: DTC Clearing # 0015

Credit To: Roman Catholic Bishop of Manchester
Account # 419-050051-005

Morgan Stanley Smith Barney Contacts:

Any questions on the transfer of stock to Morgan Stanley Smith Barney can be answered by the following representatives:

- **Contact #1:** Laszlo Hobausz (603) 629-0212
Laszlo.Hobausz@morganstanley.com
- **Contact #2:** Jess Chamberlin (603) 629-0224
Jess.Chamberlin@morganstanley.com

Diocesan Contacts:

Please contact one of the individuals listed below when the transfer of stock is to occur.

- **Contact #1:** Christine Bogacz (603) 663-0118
cbogacz@rcbm.org
- **Contact #2:** Peter Stauble (603) 663-0116
pstauble@rcbm.org
- **Contact #3:** Patricia M. Goneau (603) 663-0141
pgoneau@rcbm.org