

Stock Donation Information

The Cardinal Newman Society gratefully accepts donations of securities (including stocks and bonds), retirement plan assets, and life insurance policies. Such donations can provide tax benefits to the donor while greatly assisting our work to promote and defend faithful Catholic education. Please note that our policy is to immediately sell donated securities. We will acknowledge receipt of the securities, but IRS regulations require the donor to independently determine the gift's cash value for tax purposes; consult your broker or tax advisor. If you have questions, please contact Bob Laird, Vice President for Program Development, at (703) 367-0333 ext. 103, blaird@cardinalnewsociety.org. Thank you!

Securities delivered electronically can be sent to:

FOR STOCK DONATIONS:

Brokerage Firm: Morgan Stanley
DTC Number: 0015
Firm Address: 11951 Freedom Dr #1200, Reston, VA 20190
Broker Name: Sean P. Kearns
Broker Email: sean.kearns@morganstanley.com
Broker Phone: 703-456-6044
Broker Fax: 703-456-6098

For further credit to:

Cardinal Newman Society (Tax I.D. # 54-1691371)
Account Number: 689105263
Account Name: Cardinal Newman Society
Account Address: 10432 Balls Ford Road, Ste 300, Manassas, VA 20109

FOR FED FUND WIRES (CASH)

Bank Name: Citibank, New York (USD only)
ABA Number: 021000089
FBO Bank Account Name: Morgan Stanley Smith Barney LLC
Bank Account Number: 40611172

For further credit to:

Cardinal Newman Society (Tax I.D. # 54-1691371)
Account Number: 689105263
Account Name: Cardinal Newman Society

It would also be helpful if your broker included the following information in the transaction:

1. Your name and address
2. The name and number of securities transferred
3. Name of broker receiving securities (Morgan Stanley)
4. Date of transfer

Corporate Name: **Cardinal Newman Society for the Preservation of Catholic Higher Ed.**