

### **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 Kevin Lee, Vice President for Advancement, at (703) 367-0333 ext. 121, [klee@cardinalnewmansociety.org](mailto:klee@cardinalnewmansociety.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](mailto:sean.kearns@morganstanley.com)  
Broker Phone: 703-556-8126  
Broker Fax: 703-356-6492

For further credit to:

**Cardinal Newman Society (Tax I.D. # 54-1691371)**  
Account Number: 631105263  
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: 631105263  
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.**