



Holy Trinity Greek Orthodox Church

ΙΕΡΟΣ ΝΑΟΣ ΑΓΙΑΣ ΤΡΙΑΔΟΣ

Publicly Traded Securities Donation Form

Thank you for supporting Holy Trinity Greek Orthodox Church in Westfield, New Jersey with a gift of securities. Transferring securities (stocks, bonds, mutual funds) helps sustain the ongoing ministries of Holy Trinity. It is greatly appreciated, simple to enact, and may result in significant tax savings for you.

1. Donor Information

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

2. Donor's Broker Information

Company Name _____

Broker Name _____

City _____ State _____ Zip _____

Phone _____ Email _____

3. Securities to be Transferred

From Account # _____

_____ shares of _____

(# of shares)

(name of security)

_____ shares of _____

(# of shares)

(name of security)

_____ shares of _____

(# of shares)

(name of security)

1. Complete this form.

This information is needed for the transfer, tracking, and acknowledgment of your donation.

2. Give this form to your broker.

Your broker will arrange for the transfer of shares to Holy Trinity investment account. *Holy Trinity cannot initiate the transfer.*

3. Send a copy of the form to our broker (or ask your broker to do this).

The Maguire-Hado Group at
Morgan Stanley
Attn: Eric Hado
150 JFK Parkway, 2nd Floor
Short Hills, NJ 07078
DTC routing number: 0015
Holy Trinity Account
Number: 614-132918-138
Phone toll free: 1-800-526-4931
Direct: 1-973-912-7735

4. Send a copy of this form to Holy Trinity (or ask your broker to do this), so we may ensure a donation receipt is issued for your gift.

5. Or send the stock certificate directly to Holy Trinity Greek Orthodox Church

4. Transfer Securities In Kind to:

Greek Orthodox Community of the Holy Trinity
Investment Account # 614-132918-138
DTC Routing Number: 0015

I authorize this transfer as a charitable donation to Holy Trinity Greek Orthodox Church in Westfield, New Jersey.
I agree that Holy Trinity, or its agent, may contact my broker for the purpose of concluding this transaction.

Signature of Donor/Client

Date

Please designate the specific purpose of your donation and the amount allocable thereto.

Endowment \$ _____

General \$ _____

Ministry \$ _____

Other \$ _____

Additional comments/instructions:

Once your shares have been received and confirmation is given from our brokerage account, Holy Trinity will send a charitable contribution tax receipt and acknowledgement letter.

If you have any questions, please contact Ms. Diana Waltsak, Holy Trinity G.O.C. Office Manager at dianaw@htgoenj.org, or call 908-233-8533.

Holy Trinity Greek Orthodox Church of Westfield, New Jersey is a parish of the Greek Orthodox Metropolis of New Jersey and the Greek Orthodox Archdiocese of America. It is a recognized public charity under section 501(c)(3) of the Internal Revenue Code. Gifts to Holy Trinity are tax-deductible to the fullest extent allowed by law. The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the custodian, Morgan Stanley. Please consult your tax advisor for further information.