



## Instructions for Stock Donations to Back2Back Ministries

The donation of stocks that have appreciated in value to Back2Back Ministries can be a tax-effective way of giving. Typically, the donor uses the full market value on the date of transfer as a Charitable Donation, and no tax is incurred for the gain between the donors cost and the current market value.

### **Kim Jackson is our Service Representative**

513.762.5315

### **Our Broker is Kelly Kelp**

Morgan Stanley

7755 Montgomery Road, Suite 200, Cincinnati, OH 45236,

Phone: 513.762.5224

Fax: 513.283.0438

### **To donate securities held with a brokerage firm:**

Tell your broker you wish to donate stock to Back2Back Ministries.

The stock should be sent as follows:

Morgan Stanley

Attn: Kelly Kelp

FBO (For the Benefit of) Back2Back Ministries

DTC#0015

Account #285-114-073

### **PLEASE NOTE:**

Once you have initiated a transfer of stock, please notify Patricia Honeck at [phoneck@back2back.org](mailto:phoneck@back2back.org) with the following information:

Number of shares donated

Where stock is held/being transferred from

Estimated date of transaction (i.e. 25 shares of P & G transferred 12/15/2020)

Designation example: Care Fund

### **VERY IMPORTANT!**

It is very important you or your broker notify [phoneck@back2back.org](mailto:phoneck@back2back.org) when stock is transferred into our account as there is no donor name provided, only the brokerage firm where it came from.