



Lake Catholic High School has partnered with Catholic Community Foundation to accept stock gifts. To donate stock to Lake Catholic High School, please follow these steps:

- 1.) Contact Carla Ronnebaum at cronnebaum@lakecatholic.org or 440-578-1020 ext. 234 to notify Lake Catholic of your intention to give stock.

At this time you will notify Lake Catholic of the individual donating the stock (if different than yourself), name of stock, number of shares to be transferred, and where you would like this gift applied (The Fund for Lake Catholic, Scholarship, etc.)

Lake Catholic will then notify Catholic Community Foundation of the impending transfer.

- 2.) Provide your broker with the following information:

Receiving broker: Morgan Stanley
Account Name: Catholic Community Foundation
Account Number: 613-120296-017
DTC Routing Number: 0015

Morgan Stanley Contacts:
Cheryl Hartman
Cheryl.L.Hartman@morganstanley.com
717-519-4948

Gregory Luscher
Gregory.Luscher@morganstanley.com
717-519-4945

Per IRS rules, the value of the gift will be determined upon the date the stock is transferred into the Catholic Community Foundation account. From there, Catholic Community Foundation will direct all of those funds to Lake Catholic High School.

If you have questions about the Catholic Community Foundation process, please contact Madelyn Zone at 216-696-6525 ext. 2940 or mzone@catholiccommunity.org.

