



## How to Give Stock to Housing for New Hope, Inc.

Gifts of appreciated stock allow you to maximize your contributions to Housing for New Hope, while providing a tax deduction equal to the average value of the stock on the day donated and avoiding capital gains tax. Thank you for supporting our work.

### Contact our broker to initiate stock transfer:

The Brightleaf Group  
Morgan Stanley  
6340 Quadrangle Drive, Suite 300  
Chapel Hill, NC 27517  
Branch Phone: 919.960.5440

Contact:  
David H. Pottenger III  
Senior Portfolio Manager  
Phone: 919.490.7100  
Email: [david.h.pottenger.iii@morganstanley.com](mailto:david.h.pottenger.iii@morganstanley.com)

### Provide Housing for New Hope account information:

- DTC Clearing number: 0015
- Clearing firm name: Morgan Stanley
- Account name: Housing for New Hope
- Account number: 760-106672-133
- HNH Tax ID: 58-2089068

### Inform Housing for New Hope:

Donor information is often not shared when a stock transfer is initiated. To ensure your donation is properly applied and acknowledged, please contact Terri Hegeman at [giving@housingfornewhope.org](mailto:giving@housingfornewhope.org) or 919.748.1158 and provide:

- Name
- Address
- Phone
- Email
- Stock, number of shares, and estimated value\*

*\*Value is determined by the average high/low on the date of sale. Our policy is to sell shares upon receipt. Please consult with your personal tax advisor to discuss any tax implications of your investments and donations.*