



STOCK AND MUTUAL FUND GIFT LETTER OF INTENT

Please complete this form for ALL STOCK or MUTUAL FUND gifts and email a copy to kshooter@charlestdiocese.org to ensure processing of your gift.

Donor information & securities to be transferred (Please Print):

Name(s):	
Parish Name & Location:	
Mailing Address:	
Email Address:	Telephone:
Sending Institution:	Date gift to be initiated:
Security:	No. of shares:
Security:	No. of shares:

To be credited to the Catholic Community Foundation of South Carolina for:

☐ Bicentennial Capital Campaign (82-1557805)	☐ Catholic Appeal of South Carolina (57-0352255)
☐ Catholic Charities of SC (57-0314369)	☐ Catholic Community Foundation of SC (82-1557805)
☐ Diocese of Charleston (57-0352255)	☐ Parish _____
☐ School _____	☐ Other _____

Gift Instructions/Restrictions: _____

Donor Signature(s): _____

Instructions for your Stockbroker:

Custodian: Charles Schwab & Co., Inc.
DTC #: 0164
Code: 40
Account Name: Catholic Community Foundation of South Carolina
Account Number: 3346-3554

Please note:

- Schwab cannot process fractional shares. Please specify the securities to be donated in whole numbers.
- The Diocese is unable to accept physical stock certificates for donation.
- If securities are going to be transferred via Computershare, please contact Kelsey Shooter (kshooter@charlestdiocese.org) for additional instructions.
- For instructions to transfer **Mutual Funds** please contact kshooter@charlestdiocese.org.