



## 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@charlestdioocese.org](mailto:kshooter@charlestdioocese.org) to ensure processing of your gift.

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

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

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

<input type="checkbox"/> Bicentennial Capital Campaign	<input type="checkbox"/> Catholic Appeal of South Carolina
<input type="checkbox"/> Catholic Charities of South Carolina	<input type="checkbox"/> Catholic Community Foundation of South Carolina
<input type="checkbox"/> Diocese of Charleston	<input type="checkbox"/> Parish _____
<input type="checkbox"/> School _____	<input type="checkbox"/> Other _____

**Gift Instructions/Restrictions:** \_\_\_\_\_

**Donor Signature(s):** \_\_\_\_\_

**Instructions for your Stockbroker:**

**Receiving Institution:** Comerica Bank  
**DTC #:** 2108  
**Code:** 40  
**Account Name:** Catholic Community Foundation of South Carolina  
**Account Number:** 1-105243.7

**Please note:**

- Comerica Bank 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 for additional instructions.
- To transfer **Mutual Funds** please contact [assettransferscma@fisglobal.com](mailto:assettransferscma@fisglobal.com).