

2026 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:	
Donor's 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:

Catholic Appeal of South Carolina (57-0352255)
Catholic Community Foundation of SC (82-1557805)

Catholic Charities of South Carolina (57-0314369)
Diocese of Charleston (57-0352255)

Parish
School

Other

Gift Instructions/Restrictions:

Donor Signature(s):

Instructions for your Stockbroker:

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

PLEASE NOTE:

- Charles Schwab cannot process fractional shares. Please specify the securities to be donated in whole numbers.
- The CCFSC 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.
- **Mutual Funds:** the CCFSC can accept any mutual funds currently traded on the Charles Schwab platform.