



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

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

<b>Name(s):</b>	
<b>Parish Name:</b>	
<b>Donor's 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>
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*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:	<b>Charles Schwab &amp; Co., Inc.</b>
DTC #:	<b>0164</b>
Code:	<b>40</b>
Account Name:	<b>Catholic Community Foundation of South Carolina</b>
Account Number:	<b>3346-3554</b>

### **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.