

## PROCEDURE TO DONATE STOCK and MUTUAL FUNDS

Thank you for your inquiry on donating stock. Stock donations may be made for the benefit of a parish, school, Diocese of Charleston, Bishop's Annual Appeal, capital campaign or a ministry.

### **STOCK DONATION PROCEDURE:**

The following information is needed to ensure proper awarding of the stock donation proceeds:

- a. the name of the stock
- b. the donor's name and address
- c. the number of shares (whole numbers)

Please notify Mrs. Kathryn Dannelly, Diocese of Charleston, at 803-540-1920 or [kdannelly@charlestdiocese.org](mailto:kdannelly@charlestdiocese.org), or her mailing address is St. Joseph Catholic Church, 3512 Devine Street, Columbia, SC 29205.

***Your donation will be unable to be processed without this information.***

The donor's broker/investment bank should transfer the securities according to the following instructions:

**DTC #2108 Comerica Bank Code 40  
For further credit to: 1055077038  
Catholic Community Foundation of South Carolina  
FBO (Name of Parish/School/Diocese of Charleston/or Campaign)**

### **MUTUAL FUNDS DONATION PROCEDURE:**

For a mutual fund donation, please contact Matthew Wasmund at Comerica Bank for details on how to complete the process for this particular donation. Phone: 313-222-7092, [mhwasmund@comerica.com](mailto:mhwasmund@comerica.com).

The donor will receive an acknowledgement letter from the Diocese of Charleston after the stock or mutual funds donation is processed.

### **Please Note:**

- Comerica Bank cannot process fractional shares. Please specify the securities to be donated in whole numbers.
- If an individual holds the physical stock certificate, please contact Mrs. Kathryn Dannelly for further instructions.
- If the securities are going to be transferred via Computershare, please contact Mrs. Kathryn Dannelly for additional instructions.

*Revised August 2018*