

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 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 Kelsey Shooter at 843-261-0468 or kshooter@charlestdioocese.org, or by mail to Diocese of Charleston, Attn: Kelsey Shooter, 901 Orange Grove Road, Charleston, SC 29407.

Your donation cannot 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 Erica Carter at Comerica Bank for details on how to complete the process for this particular donation: ebcarter@comerica.com or 313-222-7115.

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.
- The Diocese is unable to accept physical stock certificates for donation.
- If the securities are going to be transferred via Computershare, please contact Kelsey Shooter for additional instructions.