
COLLEGE of CHARLESTON

FOUNDATION

66 George Street
Charleston, SC 29424

Instructions for wiring stock gifts to the College of Charleston Foundation

1) The donor provides the following information to their broker:

CofC Foundation's brokerage representative: **Mary Helen Condon Moore, Merrill Lynch
Mt. Pleasant, SC: (843) 800-6843
Phone – Toll Free: (866) 218-0447
Fax : (843) 628-6712**

Brokerage Address: 75 Port City Landing, Suite 500, Mt. Pleasant, SC 29464

DTC Number: **8862**

CofC Foundation's MERRILL LYNCH Account #: **780-04010**

2) The donor's broker should notify the Foundation of the expected stock gift.

CofC Foundation Contact: Assistant Director, Crystal Mead – meadc@cofc.edu

Additional information (it is important that the broker provide this information to assure the donor receives proper credit):

- a) Donor's name**
- b) Statement that the stock gift is to benefit the College of Charleston Foundation**
- c) Purpose of the gift (unrestricted or restricted - if restricted, please mention the program or endowed fund to which the gift should be applied)**

3) The Donor shall receive an acknowledgment letter and/or receipt, including share prices used to value the gift, from the Foundation.

Based on CASE standards and IRS regulations, the gift value shall be recognized as the average of the high and low trading price on the gift date - the date the stock is received into the foundation's brokerage account.

If you have any questions, please contact Crystal Mead at (843) 953-0970 or via email at meadc@cofc.edu.