
COLLEGE of CHARLESTON

FOUNDATION

Sottile House
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:

Foundation's brokerage representative: **Mary Helen Condon Moore, Merrill Lynch**
Charleston, SC: (843) 720-9420
Phone – Toll Free: (866) 218-0447
Fax : (843) 628-6712

Brokerage

Address: 17 Lockwood Drive, Suite 200 Charleston, SC 29401

DTC Number: **5198**

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

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)**

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

Foundation Contact: Director, Finance and Administration-Debye Alderman– (843) 953-7458

3) Merrill Lynch will send the Foundation a confirmation letter.

Upon receipt of the stock transfer, Merrill Lynch will send a confirmation letter to the Foundation. The letter will confirm the gift date and the high and low trading prices on the date of transfer. The gift value shall be recognized as the average of the high and low trading price and the gift date is the date of the electronic transfer.

4) The Donor shall receive an acknowledgement letter and receipt from the Foundation, based on the information provided by Merrill Lynch, which shall include share prices used to value the gift.

If you have any questions, please contact Debye Alderman at (843) 953-7458 or [via email at aldermanda@cofc.edu](mailto:aldermanda@cofc.edu).