Gifts of Stock, Mutual Funds and Other Securities

Thank you for considering a gift of stock to Charleston Southern University. Please follow the guidelines that pertain to your situation.

Transfer Instructions for Broker-Held Certificates

You, your broker or your financial advisor should contact Charleston Southern University’s Office of Advancement with the following information:

• Full name and address of donor
• Name of broker or financial advisor who will handle the transaction
• Name of the stock, including symbol
• Number of shares you would like to contribute

Charleston Southern University gives the donor the choice to wire transfer shares of broker-held certificates.

Following the instructions above, your broker should contact:

Brokerage: Bank of America Merrill Lynch
DTC#: 955
Charleston Southern University FCC Account#: 07-16-002-0745257

Mary Stokes, CFA
SVP, Sr. Portfolio Strategist
Institutional Investments
U.S. Trust, Bank of America Corporation
Mail Code GA7-813-14-04
404-495-7906 office
404-617-9029 cell
mary.stokes@ustrust.com

OR

Palmer Wilson, CTFA
Market Philanthropic Director, Southeast Region
U.S. Trust, Bank of America
150 North College St.; NC1-028-26-09
Charlotte, NC 28255
980-387-5846 office
palmer.wilson@ustrust.com

Please make sure the broker includes your name on the instructions or that a Stock Power of Transfer letter is completed.

Stock Power of Transfer Letter Template
Transfer Instructions for Individually-Held Certificates
If you have possession of stock certificates, send the unendorsed certificates to Charleston Southern University’s Office of Advancement at the address below.

• In a separate envelope, send a signed stock power (available from your financial services provider), to the same address.
• Because the postmark determines the date of the gift, it is important to mail both envelopes the same day.

Charleston Southern University
Office of Advancement PO Box 118087 Charleston, SC 29423-8087
843-863-7513
Charleston Southern University’s Tax ID# 57-0474 291
Date: Donor's Name 
Address 
City, State ZIP 

Dear: 
Please transfer the following securities as a gift to Bank of America Merrill Lynch for credit to Charleston Southern University. 

Number of Shares: _______________________________ 
Stock Name: ___________________________________________________________________________________________________ 
My account number is: _______________________________________________________________________________________

I would like to designate this gift to CSU for the_______________________________________ (purpose). Transfer this stock to: Charleston Southern University, a 501 (c)(3) nonprofit organization. Federal Tax ID: 57-0474 291 The DTC is: 955. Charleston Southern’s account number is 07-16-002-0745257

Please notify Bank of America Merrill Lynch at 336-543-1342 of this transfer request. If you have any questions regarding this transfer, please call me at _____________(donor’s phone number).
Sincerely,

Donor's Signature