



CATHOLIC CHARITIES HAWAII

Making a Gift of Securities

Catholic Charities Hawai'i appreciates your gift of securities to support our mission.

Stock Transfer Instructions

If you would like to transfer a gift of securities to Catholic Charities Hawai'i (CCH), please provide your broker with the following information. Your broker can then transfer the stock directly to CCH.

1. Please notify Catholic Charities Hawai'i (either you or your broker) by contacting Mary Saunders, at (808) 527-4822 or mary.saunders@CatholicCharitiesHawaii.org to let him know that you plan to transfer securities and the purpose for which you want the funds to be used.
2. Your Broker will need the following information:

Receiving Firm: Morgan Stanley | Wealth Management
733 Bishop St., 28th Floor
Honolulu, HI 96813

Catholic Charities Hawai'i **Account Number: 129-160571-431 DTC #0015**

Our stock broker is:

Keoni Lee

Island Legacy Group at Morgan Stanley

Direct Line: 808-525-6992

Main Line: 808-525-7979

Email: Keoni.Lee@morganstanley.com

Information We Need From You

We want to be sure that your gift is recorded correctly. Please complete the attached form or send us a note confirming your gift, your current address and phone number, the purpose of the gift and how you would like to be acknowledged. Please provide pertinent information if your gift is in memory or honor of an individual.

Valuation and Acknowledgement of your Gift

You will receive an acknowledgement letter from Catholic Charities Hawai'i stating the high and low prices of the securities on the date of transfer along with a confirmation of the purpose for which the funds are to be used. It is our policy to liquidate any securities upon receipt.

For more information on making a gift of securities, contact Mary Saunders, VP of Philanthropy, at 808-527-4822 or email at mary.saunders@CatholicCharitiesHawaii.org.



CATHOLIC CHARITIES HAWAII

Making a Gift of Securities to Catholic Charities Hawaii

Thank you for your gift of securities to Catholic Charities Hawaii. It is our policy to sell donations of stock upon receipt. Please complete the following information and submit to:

Catholic Charities Hawaii Development Office, 1822 Keeaumoku Street Honolulu, HI 96822

1. Contact your broker with the following information to transfer your stock

Receiving Firm: Morgan Stanley Wealth Management
733 Bishop St., 28th Floor Honolulu, HI 96813
Attention: Keoni Lee, Island Legacy Group at Morgan Stanley
Direct Line: (808) 525-6992 Main Line: (808) 525-7979
Email: Keoni.Lee@morganstanley.com

Catholic Charities Hawaii Account Number: 129-160571-431 DTC #0015

2. Please notify Catholic Charities Hawaii (either you or your broker) by calling Mary Saunders at (808) 527-4822 and email this form to mary.saunders@CatholicCharitiesHawaii.org

3. Donor(s) information

Name(s) as you wish to be acknowledged

Mailing Address: Street City State Zip

Telephone Email

- Please use my gift to help those with the greatest need.
- Please designate my gift to: _____
- This gift is to in honor of: _____ in memory of: _____

Stock name or symbol: _____

Number of shares: _____

4. Transferring broker information

Name of Broker and Name of Company

Address

City

State

Zip

Telephone

Email Address

Thank you very much for supporting Catholic Charities Hawai'i