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 l 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.

Rev 1/2022
Making a Gift of Securities to Catholic Charities Hawai‘i

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

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

2. **Please notify Catholic Charities Hawai‘i** (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**

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*Thank you very much for supporting Catholic Charities Hawai‘i*