



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 Be-Jay Kodama, at (808) 527-4822 or be-jay.kodama@CatholicCharitiesHawaii.org to let her 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 I 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 Be-Jay Kodama, VP of Philanthropy, at 808-527-4822 or email at be-jay.kodama@CatholicCharitiesHawaii.org.

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