



SOUTH CAROLINA
**CHRISTIAN
FOUNDATION**

MUTUAL FUND TRANSFER INSTRUCTIONS
for Charitable Contributions

1. REQUEST TRANSFER WITH BROKER / FINANCIAL INSTITUTION

Complete and submit “Mutual Fund Transfer” form below to the broker or financial institution holding your mutual fund(s). Your broker or financial institution must initiate transfers. Communications should be as prescribed by the institution.

2. SEND COPY OF TRANSFER REQUEST TO SCCF

To confirm proper credit and receipting, email or mail a copy of Mutual Fund Transfer form to:

admin@scchristianfoundation.org

South Carolina Christian Foundation
PO Box 172233
Spartanburg, SC 29301

3. TRANSFER TO SCCF FUND

After transfer has been initiated, it can take several business days for mutual funds to be transferred, sold, and posted to the SCCF Fund receiving the contribution.

**MUTUAL FUND TRANSFER
Letter of Authorization**

Date _____

Account Representative _____ Phone _____

Investment Company Name _____

Client Name _____ Phone _____

Client Address: _____

Account Number _____

This letter is to authorize transfer of the following shares of mutual funds directly to:

CUSIP Number of Mutual Fund: _____

Number of Shares of Mutual Fund: _____ shares

Estimated Value of Mutual Fund: \$ _____

Client Account # at Delivering Firm: _____

Delivering Firm Name: _____

Delivering Firm Address: _____

Contact at Delivering Firm (name, phone number, fax number)

Name: _____

Phone: _____

Fax: _____

The above information will be sent to Fidelity Investments for processing.

- All information must be provided to First Citizens Bank and South Carolina Christian Foundation matching exactly what is delivered, or you run the risk of the mutual fund being rejected.
- Fidelity Investments will open a file for the donor which could take a few business days to generate.
- Once the file has been opened, Fidelity Investments will provide unique transfer instructions to be given directly to the delivering firm.
- First Citizens Bank personnel must send the instructions to the delivering firm listed.
 - A copy can be sent to the appropriate individuals at First Citizens and South Carolina Christian Foundation should those instructions need to be forwarded to someone other than the delivering firm.

Sincerely,

To confirm proper credit and receipting, email or mail a copy of this form to:

South Carolina Christian Foundation
PO Box 172233
Spartanburg, SC 29301