



Gift of Appreciated Stock

Thank you for your interest in making a gift of appreciated stock to Children's Trust of South Carolina.

By giving appreciated stock directly, you may avoid hefty capital gains taxes and receive a charitable deduction for the full fair market value of the stock at the time of the gift. Gifts of appreciated stock generally offer a greater tax benefit than cash. It is important to check with your attorney or financial advisor in any gift planning to ensure you are choosing the best way to achieve your personal and charitable goals.

To make a stock or mutual fund gift to Children's Trust of South Carolina, please provide your advisor the following information:

- **Custodian** – Charles Schwab and Company, Inc.
- **Depository Trust Company (DTC) number** – #0164, Code 40
- **Client name** – Children's Trust Fund of South Carolina
- **Account number** – 8277-4249

Together you and your advisor can determine the appropriate number of shares to transfer to achieve your desired donation amount.

So that we may properly acknowledge your gift, please have your advisor notify Andrea Tucker with Children's Trust (803-733-5430 / atucker@scchildren.org) and Charles Flowers with Abacus Planning Group (803-933-0054 / charles@abacusplanninggroup.com) when your transaction is initiated.

Please direct any questions to Caitlyn McAnulty with Children's Trust (803-744-4025 / cmcanulty@scchildren.org).