



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](mailto: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