



# STOCK DONATION FORM

[www.OrangeCatholicFoundation.org](http://www.OrangeCatholicFoundation.org)

## INSTRUCTIONS FOR GIVING STOCK TO THE ORANGE CATHOLIC FOUNDATION

### **IF STOCK IS IN A BROKERAGE ACCOUNT:**

**Step 1** Contact your broker to have the gifted stock transferred to The Orange Catholic Foundation. Below is the information you will need to proceed with the transfer:

Official Name:	<b>The Orange Catholic Foundation</b>
Corporate Tax ID:	<b>33.0934571</b>
The Orange Catholic Foundation Broker:	<b>Kevin Tiber</b> Farmers & Merchants Bank 302 Pine Avenue Long Beach, CA 90802 <b>562.437.0011</b>

*Free delivery to FIS Wealth Outsourcing | Depository Trust Company: DTC 5409  
Account #: 74.2082.01.9 Farmers and Merchants Trust Company. F/C 82.60.0011.01.9 OCF*

**Step 2** Please complete the "Authorization for Transfer of Gift Securities" form (included with these instructions) and send it to both **The Orange Catholic Foundation** and **Kevin Tiber** using one of the addresses below:

**The Orange Catholic Foundation**  
13280 Chapman Avenue, Suite 430  
Garden Grove, CA 92840

Email: [Info@OrangeCatholicFoundation.org](mailto:Info@OrangeCatholicFoundation.org)

Phone: **714.282.3021**

Fax: **657.206.4453**

**Mr. Kevin Tiber**

*President*

Farmers & Merchants Bank  
302 Pine Avenue  
Long Beach, CA 90802

Email: [Kevin.Tiber@fmb.com](mailto:Kevin.Tiber@fmb.com)

Phone: **562.437.0011**

Fax: **562.436.5048**

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### **IF STOCK IS IN THE FORM OF A STOCK CERTIFICATE REGISTERED IN YOUR NAME(S):**

**Step 1** Deliver the stock certificate(s) plus a signed "Authorization for Transfer of Gift Securities" form to the address above. The donor's or donors' signature(s) on the Third-Party Release form must be notarized for The Orange Catholic Foundation to sell the stock.

Your tax deduction is the median price of your stock on the date the stock transfers to **The Orange Catholic Foundation** or the date you deliver your stock certificates to our office.

## AUTHORIZATION FOR TRANSFER OF GIFT SECURITIES



Please accept our donation of \_\_\_\_\_ shares of \_\_\_\_\_  
(# of shares) (Name of Security)

For the benefit of: (Specific Fund/Endowment, Donor-Advised Fund, The Orange Catholic Foundation Fund, Other)  
Program or Fund Dollar / Percent Split

1.	
2.	
3.	
4.	

Gifts to The Orange Catholic Foundation will be presumed to be for general unrestricted purposes unless otherwise indicated above.

Free delivery from donor's brokerage firm or bank:

Broker/contact name and phone: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Account number: \_\_\_\_\_

Free delivery to FIS Wealth Outsourcing:

**DTC 5409, Account #74.2082.01.9 Farmers & Merchants Trust Company, For Further Credit to:  
The Orange Catholic Foundation 82.60.0011.01.9 | (See Entity Above)**

If you have questions regarding this transfer, please contact **Kevin Tiber** at **562.437.0011**.

Donor(s) Name(s): \_\_\_\_\_

Donor Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

\_\_\_\_\_  
Donor Signature / Date

\_\_\_\_\_  
Donor Signature / Date

*This gift letter needs to be signed by the donor exactly as the name or names appear on the account from which the stock is being transferred. All account owners must sign.*

### IMPORTANT! CC OR FAX COPY:

**The Orange Catholic Foundation**  
13280 Chapman Avenue, Suite 430  
Garden Grove, CA 92840  
  
Email: [Info@OrangeCatholicFoundation.org](mailto:Info@OrangeCatholicFoundation.org)  
  
Phone: 714.282.3021  
  
Fax: 657.206.4453

**Mr. Kevin Tiber**  
*President*  
Farmers & Merchants Bank  
302 Pine Avenue  
Long Beach, CA 90802  
  
Email: [Kevin.Tiber@fmb.com](mailto:Kevin.Tiber@fmb.com)  
  
Phone: 562.437.0011  
  
Fax: 562.436.5048