



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

*Free delivery to FIS Wealth Outsourcing | Depository Trust Company: DTC 5409
Account #: 74.2082.01.9 Farmers & 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
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
Phone: **562.437.0011**
Fax: **562.436.5048**

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: _____ Anonymous (Yes/No): _____

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:

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Garden Grove, CA 92840

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Phone: 714.282.3021

Fax: 657.206.4453

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