



## Instructions for Giving Stock to the Orange Catholic Foundation

### If the 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:	Orange Catholic Foundation
Corporate Tax ID:	33-0934571
Orange Catholic Foundation Broker:	Kevin Tiber Farmers and Merchants Bank 302 Pine Avenue Long Beach, CA 90802 562.437.0011

**Free deliver 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 forward it to both the Orange Catholic Foundation and Kevin Tiber at the addresses below:

Orange Catholic Foundation 13280 Chapman Avenue, Suite 430 Garden Grove, CA 92840 <a href="mailto:Info@OrangeCatholicFoundation.org">Info@OrangeCatholicFoundation.org</a> Phone: 714.282.3021 Fax: 657.206.4453	Mr. Kevin Tiber Sr. Vice President/CEO Farmers and Merchants Bank 302 Pine Avenue Long Beach, CA 90802 <a href="mailto:Kevin.Tiber@fmb.com">Kevin.Tiber@fmb.com</a> Phone: 562.437.0011 Fax: 562.436.5048
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### If the stock gift 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

Name: \_\_\_\_\_

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



Dear Orange Catholic Foundation,

**OCF TAX ID: 33-0934571**

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

**For the benefit of: (Specific Fund/Endowment, Donor-Advised Fund, Orange Catholic Foundation Fund, Other)**

<u>Program or Fund</u>	<u>Dollar/Percent Split</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

*Gifts to the Foundation will be presumed to be for general unrestricted purposes unless otherwise indicated above.*

**Free deliver from donor's brokerage firm or bank:**

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

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

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

**Free deliver to FIS Wealth Outsourcing: DTC 5409, Account #74-2082-01-9 Farmers & Merchants Trust Company, For Further Credit to: 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.

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

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

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

Donor address: \_\_\_\_\_

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

*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:

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

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