



**Instructions for Giving Securities  
to the Orange Catholic Foundation for the  
*For Christ Forever Capital Campaign***

**If your stock is in a brokerage account:**

**Step 1:** Contact your broker to have the gifted securities transferred to the Orange Catholic Foundation and specify that your gifted securities are designated for the *For Christ Forever Capital Campaign*. Below is the information you will need to proceed with the transfer:

Official Name: FBO OCF-For Christ Forever Capital Campaign  
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 the BMO Harris Bank N.A: Depository Trust Company: (DTC) # 992  
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 Yolanda Wright and Kevin Tiber at the addresses below:

Ms. Yolanda Wright  
Senior Funds Coordinator  
Orange Catholic Foundation  
Diocesan Pastoral Center  
13280 Chapman Avenue  
Garden Grove, CA 92840  
[ywright@OrangeCatholicFoundation.org](mailto:ywright@OrangeCatholicFoundation.org)  
Phone: (714) 282-3134  
Fax: (714) 282-3136

Mr. Kevin Tiber  
Sr. Vice President / CEO  
Farmers and Merchants Bank  
302 Pine Avenue  
Long Beach, CA 90802  
[kevin.tiber@fmb.com](mailto:kevin.tiber@fmb.com)  
Phone: (562) 437-0011  
Fax: (562) 436-5048

**If your 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 school to sell the stock.

Your tax deduction is the median price of your stock on the date the stock transfers to the For Christ Forever Capital Campaign or the date you deliver your stock certificates to our office.

**For forms and instructions, please visit our website at: <http://forchristforever.org/ways-of-giving/gifts-pledges/>**

*Supporting our faith, church and future*



## Authorization for Transfer of Gift Securities

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

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

Dear Orange Catholic Foundation,

**OCF TAX ID: 33-0934571**

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

### For the benefit of: *For Christ Forever Capital Campaign*

Please indicate the name of your parish to credit the parish share.

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

*Your gift to the Orange Catholic Foundation for the For Christ Forever Capital Campaign will be credited towards the campaign target goal for your parish if your parish is conducting a "good faith" capital campaign. Please contact the OCF for further information.*

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

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

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

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

**Free deliver to the BMO Harris Bank N.A: Depository Trust Company: (DTC) # 992  
Account #: 74-2082-01-9 Farmers and Merchants Trust Company. F/C 82-60-0011-01-9 OCF  
(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: \_\_\_\_\_  
(Address) (City) (State) (Zip) E-mail: \_\_\_\_\_

### Notes:

*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:**

**Yolanda Wright**  
Orange Catholic Foundation  
Diocesan Pastoral Center  
13280 Chapman Avenue  
Garden Grove, CA 92840 (714) 282-3134  
**FAX: (714) 282-3136**  
**Email: YWright@OrangeCatholicFoundation.org**

**Kevin Tiber**  
Farmers & Merchants Bank  
302 Pine Avenue  
Long Beach, CA 90802 (562) 437-0011  
**FAX: (562) 436-5048**  
**Email: Kevin.Tiber@fmb.com**