



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 Yolanda Wright and Kevin Tiber at the addresses below:

Ms. Yolanda Wright
Donor Services Manager
Orange Catholic Foundation
Diocesan Pastoral Center
13280 Chapman Avenue
Garden Grove, CA 92840
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
Phone: 562.437.0011
Fax: 562.436.5048

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, Parish, School, Donor-Advised Fund, OCF Fund, Other)

The charitable entity MUST BE LOCATED IN THE DIOCESE OF ORANGE in CALIFORNIA and be a parish, school, or organization listed in "The Official Catholic Directory." Please call the OCF office to confirm that the charity is in the Diocese of Orange and is not outside our scope of support.

<u>Entity</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:

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