



**ROMAN CATHOLIC
DIOCESE of ORANGE**

PASTORAL CENTER: FINANCE OFFICE
13280 CHAPMAN AVENUE, GARDEN GROVE, CA 92840

Instructions for Giving Stock to the Roman Catholic Bishop of Orange (Diocese)

If the stock is in a brokerage account:

Step 1: Contact your broker to have the gifted stock transferred to the Roman Catholic Bishop of Orange (Diocese). Below is the information you will need to proceed with the transfer:

Official Name: Roman Catholic Bishop of Orange (Diocese)
Corporate Tax ID: 95-3018918

RCBO Broker: Rachel Gallito
Securities Transfer Representative
Farmers and Merchants Trust Company
302 Pine Avenue
Long Beach, CA 90802
562.485.3480

**Free deliver to FIS Wealth Outsourcing: Depository Trust Company: (DTC) # 5409
Account #: 74-2082-01-9 Farmers and Merchants Trust Company. F/C 82-71-0153-01-6
RCBO**

Step 2: Please complete the "Authorization for Transfer of Gift Securities" form (included with these instructions) and forward it to both Anthony Jung and Rachel Gallito at the addresses below:

Anthony Jung
Director of Pastoral Center Finance
Diocese of Orange
13280 Chapman Avenue
Garden Grove, CA 92840
ajung@rcbo.org
Phone: 714.282.3011

Rachel Gallito
Securities Transfer Representative
Farmers and Merchants Trust
302 Pine Avenue, 2nd Fl.
Long Beach, CA 90802
trustoperations@fmb.com
Phone: 562.485.3452
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 Roman Catholic Bishop of Orange to sell the stock.



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13280 CHAPMAN AVENUE, GARDEN GROVE, CA 92840

Date: _____

Name of Brokerage/Firm: _____

Address: _____

City, State Zip: _____

RE: Authorization for Transfer of Gift Securities

Name of Account Holder: _____

Account Number: _____

Dear Sir/Madam:

Please be advised, I am gifting shares of stock to the **Roman Catholic Bishop of Orange (Diocese)** for the benefit of: _____

Name of Parish/School, Program, or Fund

Please free deliver via book entry the following:

Name of Stock(s)	No of Shares	Ticker Symbol

To:

FIS Wealth Outsourcing

DTC Participant # 5409

Acct#74-2082-01-9 Farmers and Merchants Trust Company,

Further Credit to: **82-71-0153-01-6 (Roman Catholic Bishop of Orange-Diocese)**

For further questions regarding this transfer request, please contact our representative at Farmers & Merchants Trust Company, Rachel Gallito at (562) 485-3452 or email at rachel.gallito@fmtrust.com.

Sincerely,

(Account Holder Signature)

Date

Print Name

Mailing Address

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

Important! Please CC or Fax Copy:

Anthony Jung
Director of Pastoral Center Finance
Diocese of Orange
13280 Chapman Avenue
Garden Grove, CA 92840
ajung@rcbo.org
Phone: 714.282.3011

Rachel Gallito
Securities Transfer Representative
Farmers and Merchants Trust Company
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