

**STOCK TRANSFER PROCESS – 50<sup>th</sup> Anniversary Project**  
**Stock Donation Option I – Certificates in Hand**

**I. Stock Certificate in Donor's Hand**

**A. Summary** – Transfer stock certificates to **Schwab OCBCEF Account** so that the certificates can be liquidated and the net proceeds transferred to “**OCBC 50<sup>th</sup> Anniversary Project**” in the donor's name.

**B. Process**

**1. Third Party Release Form (Schwab)** – This form releases the donor's securities to a Third Party (Schwab). This form must be notarized.

**a) Information you will need to complete this form –**

- 1) Name as it Appears on the Account –  
**Orange County Buddhist Church Endowment Fund**
- 2) Home Street Address –  
**909 S. Dale Avenue, Anaheim, CA 92804**
- 3) Account Number – **1220-7846**

**2. Irrevocable Stock or Bond Power Form (Schwab)** – complete this form to authorize the certificates to be deposited into the OCBCEF Schwab account. This authorizes Schwab to transfer the certificates to OCBCEF Schwab account. No notary is required.

**a) Information you will need to complete this form –**

- 1) Client's Information – Name of Client:  
**Orange County Buddhist Church Endowment Fund**
- 2) Client's Information – Account Number: **1220-7846**

**3. Acknowledgement Letter and Pledge Statement** – you will receive an acknowledgement letter from the “**OCBC 50<sup>th</sup> Anniversary Project**” that will confirm your donation and a separate OCBC 50<sup>th</sup> Anniversary Project Pledge statement that will note the net proceeds amount that was received by the Project. Please keep these documents for your tax records.

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