

STOCK TRANSFER PROCESS – 50th Anniversary Project
Stock Donation Option II – Certificates in Schwab Brokerage Account

I. Stock Certificate in Schwab Brokerage Account

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

B. Process

1. Write a Letter of Instruction – to Schwab authorizing the transfer of certificates to OCBCEF.

2. Information Required in your Letter of Instruction

- a. Your account name and number
- b. The stock name, stock symbol, and number of shares to be transferred.
- c. Whether you want the gift to be anonymous or not.
- d. The Charity’s account name: **Orange County Buddhist Church Endowment Fund.**
- e. The Charity’s account number: **1220-7846**
- f. The Letter of Instruction must be signed and dated

3. Acknowledgement Letter and Pledge Statement – you will receive an acknowledgement letter from the “**OCBC 50th Anniversary Project**” that will confirm your donation and a separate OCBC 50th 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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