

STOCK TRANSFER PROCESS – 50th Anniversary Project
Stock Donation Option III – Certificates in Non-Schwab Account

I. Stock Certificate in Non-Schwab Account (Fidelity, E*Trade, etc.)

A. Summary – Wire certificates directly to OCBCEF Schwab account. OCBCEF will then liquidate the certificates and transfer the net proceeds to “**OCBC 50th Anniversary Project**” in the donor’s name.

B. Process

1. Wire the certificates to the OCBCEF Schwab account.

2. OCBCEF Schwab account information

- a. DTC number (Depository Trust Co.) for Schwab: **0164** (code 40)
- b. The Charity’s account name: **Orange County Buddhist Church Endowment Fund**
- c. The Charity’s account number: **1220-7846**

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 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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