



**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 Sean Connolly and Rachel Gallito at the addresses below:

**Sean Connolly**  
Controller  
Diocese of Orange  
13280 Chapman Avenue  
Garden Grove, CA 92840  
[sconnolly@rcbo.org](mailto:sconnolly@rcbo.org)  
Phone: 714.282.3011  
Fax: 714.637.2988

**Rachel Gallito**  
Securities Transfer Representative  
Farmers and Merchants Trust  
302 Pine Avenue, 2<sup>nd</sup> Fl.  
Long Beach, CA 90802  
[trustoperations@fmb.com](mailto: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.



**ROMAN CATHOLIC  
DIOCESE of ORANGE**

PASTORAL CENTER: FINANCE OFFICE  
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: \_\_\_\_\_.

Program(s) or Fund(s)

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](mailto:rachel.gallito@fmtrust.com).

Sincerely,

\_\_\_\_\_  
(Account Holder Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name

*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:**

Sean Connolly

Controller

Diocese of Orange

13280 Chapman Avenue

Garden Grove, CA 92840

sconnolly@rcbo.org

Phone: 714.282.3011

Fax: 714.637.2988

Rachel Gallito

Securities Transfer Representative

Farmers and Merchants Trust Company

302 Pine Avenue, 2nd Fl.

Long Beach, CA 90802

rachel.gallito@fmtrust.com

Phone: 562.485.3452

Fax: 562.436.5048