



**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 Finance  
Diocese of Orange  
13280 Chapman Avenue  
Garden Grove, CA 92840  
[ajung@rcbo.org](mailto:ajung@rcbo.org)  
Phone: 714.282.3011

**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.



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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: \_\_\_\_\_.

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](mailto: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 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  
302 Pine Avenue, 2nd Fl.  
Long Beach, CA 90802  
rachel.gallito@fmtrust.com  
Phone: 562.485.3452  
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