

**Diocese of Oakland
Stocks and Securities Donation Form**



Date _____

Donor's Name _____
Donor's Address _____
Donor's City, State, Zip _____
Donor's Phone Number _____
Broker's Name _____
Brokerage Firm Name _____
Broker's Address _____
Broker's City, State, Zip _____
Broker's Phone Number _____

Account Number: _____

Dear _____,

Please transfer _____ shares of _____ stock from my account to DTC 0164 to Charles Schwab account number 7623-1468 for Roman Catholic Bishop of Oakland, a corporation sole, for further credit to: _____

(Enter name of Parish/School/Diocesan Entity and further restriction, if applicable)

For allocations of gifts, please indicate % allocations or if you indicate dollar amounts, be sure to circle which account to apply any surplus or shortfall since the final amount of your contribution will be determined at the time of the actual securities sale.

In the event mutual funds or stock certificates are to be transferred to the account of the Roman Catholic Bishop of Oakland, a corporation sole, the finance office of the Diocese should be contacted before a transfer of ownership is attempted. If there are any questions concerning the handling of securities donations, please contact John Pluth, Controller, at (510) 267-8336 or jpluth@oakdiocese.org.

Thank you for your assistance.

Sincerely,

(Signature)

(Printed Name)

cc: John Pluth, Finance Department, Diocese of Oakland; Email: jpluth@oakdiocese.org or Fax (510) 839-7545

cc: _____
Parish/School or Business Manager of Recipient Parish/School