



# LETTER OF AUTHORIZATION TO BROKER

Please give this form to your broker or financial advisor.

Date: \_\_\_\_\_

### Your Personal Information:

Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_

### Your Broker Information:

Broker Name \_\_\_\_\_  
Firm Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_

I wish to make a gift of common stock to the Jewish Community Foundation of Orange County, a tax-exempt, non-profit 501(c)(3), charitable organization registered with the IRS TIN #95-3645825. Accept this letter as your authorization to complete the transfer. Please transfer the following shares from my account # \_\_\_\_\_

Number of Shares	Stock Symbol	Company Name
_____	_____	_____
_____	_____	_____
_____	_____	_____

The delivery instructions are as follows:

Brokerage Firm: CHARLES SCHWAB  
Account Name: JEWISH COMMUNITY FOUNDATION OF ORANGE COUNTY  
DTC: 0164  
Account Number: 2452-0728  
Brokerage Address: 16 Corporate Plaza Drive, Newport Beach, CA 92660  
Brokerage Phone: 949-718-5108

Sincerely,

\_\_\_\_\_  
Signature

Electronic transfers do not include the name of the donors, so please be sure to notify us that you have made a stock gift, including your full name, the name of the stock and the number of shares. This will help us properly acknowledge your gift and provide a prompt tax receipt. The value of your gift will be determined by your broker based on the average of the high and low of the stock on the date of the gift. The date of the gift is the day the shares reach the Jewish Community Foundation of Orange County account when transferred electronically.

**Please provide a copy of this completed form to your broker and the Foundation via fax to (949) 435-3499 Attention: Donor Services or email to [DonorRequests@jcfoc.org](mailto:DonorRequests@jcfoc.org)**