



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 and/or mutual funds to the Jewish Community Foundation of Orange County, a tax-exempt, non-profit 501(c)(3), charitable organization registered with the IRS EIN #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: 2020 Main Street #160, Irvine, CA 92614
Brokerage Phone: (949) 955-4099

Sincerely,

Signature

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 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 Orange County account when transferred electronically. The Foundation makes every effort to sell received stocks within one business day of them hitting our account. Please note that the Foundation is not liable for any fluctuations in value due to market volatility. As a service to donors who access the services of the Foundation for the purpose of passing through a bequest or stock gift directly to another organization without placing the money into a fund held at the Foundation, we will process these gifts subject to the following fees: \$500 Passthrough Bequest Fee. \$250 Passthrough Stock Transfer Fee Per Transfer.

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