



## Gifts of Stock Instruction Form

### Procedures for donating stock to OICF:

Notify your broker that you are making a gift of stock to Orcas Island Community Foundation. Please direct stock gifts as follows:

- Brokerage: Charles Schwab & Co.
- Account Title: Orcas Island Community Foundation
- Account Number: 4631-2238 (Short Term account)
- DTC Number: 0164

Donor First & Last Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Approximate Value of Shares: \$ \_\_\_\_\_

Anticipated Date of Transfer: \_\_\_\_\_ Is this gift anonymous? ☐ Yes ☐ No

Your Brokerage Firm & Contact Info: \_\_\_\_\_

### Gift Designations:

Once the stock is received in our brokerage account, we will instruct our broker to sell and then OICF will distribute funds per your instructions. Please indicate the OICF Fund(s) and/or any non-profit organization that you would like your gift distributed to in terms of percentage. Please include the purpose, e.g. "unrestricted" or a specific program or fund. If you have more than five designations, please duplicate this page and complete the bottom portion only. [View all funds held at OICF here.](#)

*We hope you consider a gift to the OICF Foundation Fund which supports our projects, programs and initiatives that are focused on building a stronger and more resilient community through partnerships that connect people, ideas, resources, and opportunities for greater impact.*

Organization Name	Fund/Purpose	Percentage

### THANK YOU FOR YOUR GENEROSITY!

Please email completed forms to [molly@oicf.us](mailto:molly@oicf.us) or drop by our office at 33 Urner Street #4  
Please call with any questions 360-376-6423