

# Diocese of Oakland

## Stocks and Securities Donation Form



Date \_\_\_\_\_

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

**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: **Christ the King Catholic Church, Pleasant Hill, CA**

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 Mark Olson at (510) 267-8375.

Thank you for your assistance.

Sincerely,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

cc: Mark Olson, Finance Department, Diocese of Oakland; Fax (510) 839-7545; [MOlson@oakdiocese.org](mailto:MOlson@oakdiocese.org)  
Helen Christian, CTK Office Manager; [office@ctkph.org](mailto:office@ctkph.org)  
Greg Thornbury, CTK Finance Council Chairman; [gmthornbury@outlook.com](mailto:gmthornbury@outlook.com)