



Catholic Community Foundation of Oregon

Securities Gift Transfer Instruction Form

SECTION I

Name Stock, Mutual Fund or ETF for transfer and identify designation

Name of Security: _____

Number of Shares: _____

Identify for the Benefit of: _____

(Indicate: Parish, School or other programs or ministries)

Gifts to the diocese will be presumed to be for general purposes unless otherwise indicated above.
If donation is for more than one purpose, please indicate percentage, share or dollar value for each gift

SECTION II

(ACATS) Automated Customer Account Transfer Service Instructions

FROM - Transfer (ACATS) from Donors Brokerage Account:

Brokerage Firm Name: _____

Broker/Contact Name: _____ Phone#: _____

Name(s) on Account: _____ Account#: _____

To - Transfer (ACATS) to The Legacy of Faith Catholic Community Foundation of Oregon (Tax ID 20-4865678)

LFF Brokerage Firm Name: **Wells Fargo Clearing Services, LLC**

LFF (DTCC) Depository Trust Clearing Corp Number: **0141**

LFF Brokerage Firm Address: **650 SW Bond 2nd Floor Bend OR 97702**

LFF Client Name: **The Legacy of Faith Catholic Community Foundation of OR**

LFF Account Number: **2919-9422**

If you or your Broker has questions for Wells Fargo, please contact our Advisor: Kevin Freihoefer at (541) 633-1929 or email: Kevin.j.freihoefer@wellsfargo.com

SECTION III

All account owners must sign the authorization

Donor Signature: _____ Print Name: _____ Date: _____

Donor Signature: _____ Print Name: _____ Date: _____

Donor Address: _____ City: _____ State: _____ Zip: _____

Donor Phone #: _____ Donor Email: _____

Please complete an authorization form for each gift transaction you wish to make. Send Original form to the Donor's Broker and send a copy to mark@dioceseofbaker.org or The Legacy of Faith Foundation, 641 SW Umatilla Ave, Redmond, OR 97756.

If you have any questions regarding the completion of this form, please contact the LFF Exec Dir: Mark French at (541) 388-4004.