

Stock Donation Form

- Complete this form and submit a copy to Accounting and Data Services
- Use this form for charitable gift donations by transferring stocks, bonds, and/or mutual funds.
- Once this form is received you will be provided with the instructions for transferring stocks to the Orthodox Union.

1. Donor Information

Donor Account ID Number	Contact Name
Donor First Name	Donor Last Name
Donor Mailing Address	City State Zip
Donor Telephone Number ()	Donor Email Address
Allocation of Donation	
Additional Information	

2. Stocks to Be Transferred

For each stock, indicate transfer date, number of shares, and the stock symbol*.

Name of Stock	Symbol/Ticker	Number of Shares	Transfer Date (approximate)	Cost Per Share (approximate)

*When stock transfers are received by the OU, they do not contain any information other than what stocks were transferred, so this information is vital to ensuring that the donation is properly recorded and the donor properly acknowledged.

3. Transfer Specific Instructions (This section should be left blank unless instructed otherwise by accounting)

Receiving Institution Account Number	Account Title/Registration
Contact Name at Charitable Organization or Name of Individual Recipient	Telephone Number ()
Mailing Address	City State Zip
Name of Receiving Institution	DTC Number