

# GIFTS OF STOCK

## MAKING A GIFT OF STOCK

Your contribution of stock to Make-A-Wish® Orange County and the Inland Empire is deeply appreciated as it helps grant the wishes of children with life-threatening medical conditions in our community. There are two steps to complete your gift of stock.

**First:** Contact your broker and ask them to set the transaction in motion by arranging a transfer of stocks. They will need the information below to do so.

Name of company's stock you wish to contribute: \_\_\_\_\_

Approximate number of shares: \_\_\_\_\_ Approximate value: \_\_\_\_\_

Your broker will need our broker's account and contact information to complete the transfer:

### **BNY Mellon**

Account number: 10514122000 for Make-A-Wish Orange County and the Inland Empire

DTC Number: 8275

Broker: Niza Oun Nguyen

Phone: (949) 253-5026

Email: [Niza.oun-nguyen@bnymellon.com](mailto:Niza.oun-nguyen@bnymellon.com)

### **Merrill Lynch**

Account number: 29J-74005 for Make-A-Wish Fnd Orange County and the Inland Empire

Financial Advisor: Tino Pagano

Phone: (714) 429-2870

Email: [tino\\_pagano@ml.com](mailto:tino_pagano@ml.com)

DTC Number: 8862

**Second:** Send us this form by email ([donations@wishocie.org](mailto:donations@wishocie.org)), fax (714-689-0985) or mail (address below) advising us of your plans so that we can confirm and acknowledge your contribution.

Name: \_\_\_\_\_

Date of transfer: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

I have included Make-A-Wish Orange County and the Inland Empire in my will.

Debbie Finster  
VP of Major Gifts & Legacy Planning  
(714) 573-9474, ext. 239  
[dfinster@wishocie.org](mailto:dfinster@wishocie.org)

-or-

Shin-Ja Kammann  
Chief Operating Officer  
(714) 573-9474, ext. 237  
[skammann@wishocie.org](mailto:skammann@wishocie.org)

Mail this form to:

**Make-A-Wish Orange County and the Inland Empire**

3230 El Camino Real, Suite 100

Irvine, CA 92602

Or email to [donations@wishocie.org](mailto:donations@wishocie.org)

**Make-A-Wish**<sup>®</sup>  
ORANGE COUNTY AND  
THE INLAND EMPIRE