

# Security Gift Form



Thank you for prayerfully deciding to contribute stocks, bonds, mutual funds or another marketable security. We are honored to serve you and work together to further God's kingdom through your generous gift.

## INSTRUCTIONS

1. Complete form and return by email (service@orchardalliance.org), fax (719-323-6218), or mail (address below)
2. Contact your brokerage firm to transfer your securities into Orchard Alliance's gift account (Account information in the bottom right corner of this form)

*We highly recommend that you consult with your tax advisor to consider tax implications of this gift. Receiving a completed Security Gift Form is critical as it allows us to sell the shares once they are received in Orchard Alliance's gift account.*

Named owner of the security

Address of owner

City

State

Zip

Phone number

Email address

Name of the security

(Attach a separate sheet if necessary)

Number of shares

Please choose one of the following: A or B

A) This gift will fund a charitable account at Orchard Alliance.

Account type:  Donor Advised Fund  Charitable Gift Annuity  Charitable Trust  Endowment

B) This is a direct gift to a charity. (\$125 processing fee per gift applies. Recommended minimum gift value is \$2500 or greater.)

Name of the charity

Address of charity

City

State

Zip

Designation (if any)

Please process this gift as anonymous to the charity.

Signature

Date

**Please provide the following information to your broker for electronic transfer of securities:**

Graystone Consulting, a business of Morgan Stanley  
760 W. Main Street, Suite 200  
Barrington, IL 60010  
847.382.3802  
Attn: Diane Wasilk

Account Number: 694-072508  
Account name: Orchard Alliance Gift Account  
DTC Number: 0015  
EIN for Orchard Alliance: 84-1466105

**Investments | Loans | Planned Giving**

8595 Explorer Dr. Colorado Springs, CO 80920 / Toll Free 833.672.4255 / Fax 719.323.6218 / [orchardalliance.org](http://orchardalliance.org)