

## **GIFTS OF SECURITIES (Rev. 10/2015)**

Thank you for considering making a gift of securities to The Onondaga Community College Foundation.

The value of your gift of securities will be computed as the arithmetic mean between the high and low market quotations on the date you make your gift. Your gift is considered “made” on the date the securities pass unconditionally from your control. In the case of securities you mail, this is the date of mailing (postmark). In the case of securities electronically transferred by your broker, this is the day the stock is received in an OCC Foundation account.

Please copy Lisa R. Moore at the address below on any correspondence/communication with your broker regarding your gift. Without such notice, gifts of stock may be transferred to the Foundation as “unidentified”, making proper credit and timely gift acknowledgement extremely difficult.

### **For securities held by your bank or broker:**

You will need to notify the party holding your securities to make the transfer. You may wish to do so in writing, utilizing language similar to that found on the attached stock transfer request form.

Should you wish to notify your broker by phone, you will need to supply the following information to your broker:

OCC Foundation’s Portfolio Custodian is Sanford C. Bernstein & Co., LLC  
Individual to contact with questions: at OCC – Lisa R. Moore (315) 498-6060  
OCC Foundation Account #03991332  
DTC Clearing Number 013  
Account Name: OCCF Investments

All of the above information is also available to you on the attached stock transfer request form.

### **For securities held by you:**

Please send unendorsed certificates by mail, along with a letter of instruction indicating your desire to gift them to the OCC Foundation and your authorization for them to be deposited into an OCC Foundation Account, to:

Lisa R. Moore  
Vice President for Development  
Onondaga Community College Foundation  
4585 West Seneca Turnpike  
Syracuse, NY 13215-4585  
Phone (315)498-6060  
Fax (315) 498-7214  
zacharej@sunyocc.edu

In a separate envelope, please mail to the same address, a stock power (see attached) for each stock certificate.

## STOCK TRANSFER REQUEST FORM

To: (Your broker's name) \_\_\_\_\_

Brokerage: (Your brokerage) \_\_\_\_\_

I would like to make a gift of \_\_\_\_\_ shares of \_\_\_\_\_

from *my* account number \_\_\_\_\_ to Onondaga Community College

Foundation:

Sanford C. Bernstein & Co., LLC  
DTC #: 013  
Account #: 03991332  
Account Name: OCCF Investments

The OCC Foundation's Federal Tax ID # is 22-2318303.

Please contact Lisa R. Moore, OCC Vice President for Development at (315) 498-6060 with any questions.

Signed (donor): \_\_\_\_\_ Date: \_\_\_\_\_

Signed (donor, joint owner): \_\_\_\_\_ Date: \_\_\_\_\_

**IRREVOCABLE STOCK OR BOND POWER**

For value received, the undersigned does (do) hereby sell, assign and transfer to  
Onondaga Community College Foundation, Federal Tax ID#22-2318303

***IF STOCK,  
COMPLETE THIS  
PORTION*** \_\_\_\_\_ shares of the \_\_\_\_\_ stock  
of \_\_\_\_\_

Represented by certificate(s) no(s) \_\_\_\_\_ inclusive,  
standing in the name(s) of the undersigned on the books of said  
company.

***IF BONDS,  
COMPLETE THIS  
PORTION*** \_\_\_\_\_ bonds of \_\_\_\_\_  
in the principal amount of \$ \_\_\_\_\_,

No(s), \_\_\_\_\_ inclusive, standing in the name(s) of the  
undersigned on the books of said company.

The undersigned does (do) hereby constitute and appoint \_\_\_\_\_  
attorney to transfer the said stock or bond(s) as the case may be on the books of said  
company, with full power of substitution in the premises.

Dated \_\_\_\_\_

**IMPORTANT – READ CAREFULLY**  
The signature(s) of this Power must correspond with the name(s) as  
written upon the face of the certificate(s) or bond(s) in every  
particular without alteration or enlargement or any change whatever.

Person(s) executing this power sign here:

X \_\_\_\_\_

X \_\_\_\_\_