



**PLEASE COMPLETE AND RETURN BY MAIL:**  
Philharmonic Society of Orange County  
Attn: Development Department  
2082 Business Center Drive, Suite 100  
Irvine, CA 92612

## GIFT OF STOCK TRANSACTION FORM

Thank you for making a gift of stock to the Philharmonic Society of Orange County. Please complete this form and mail or e-mail it to the Philharmonic Society with each gift. Also, please attach a copy of any correspondence you have with your stockbroker regarding this gift.

Please provide your stockbroker with the following information:

DTC# 0221

UBS, 1000 Harbor Boulevard, 3<sup>rd</sup> Floor, Weehawken, NJ 07086

Phone: (833) 837-9974 (Scott Zimmerman, Financial Advisor)

For credit to: Philharmonic Society of Orange County. Account # UJ-46383-25

### CONTACT INFORMATION

Member's Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_  
(First) (Last) (First) (Last)

Mr. & Mrs.  Dr. & Mrs.  Mr.  Mrs.  Ms.  Other \_\_\_\_\_

\_\_\_\_\_  
(Check box and print name exactly how you wish your contribution to be acknowledged in programs and mailings)

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ ZIP \_\_\_\_\_

Check box if this is a new address.

Cell Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

Email \_\_\_\_\_

### STOCK INFORMATION

Transaction Date: \_\_\_\_\_

Stockbroker Name: \_\_\_\_\_ Stockbroker Telephone: \_\_\_\_\_

Stock Name: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Approximate Gift Value: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Thank you for your tax-deductible donation. Philharmonic Society Tax ID# 95-180545.  
If you have any questions, please call Ronald Dufault, Vice President Development, at 949-553-2422, ext. 202.