

*Please complete the form below and return it to Orchard Alliance.
The bottom portion of the form contains transfer instructions to be given to your broker.
Please call (833) 672-4255 or email service@orchardalliance.org if you have any questions.*

We highly recommend that you consult with your tax advisor to consider tax implications of this gift.

Named owner of the security _____

Address of owner _____

Phone number _____ Email address _____

Name of the security _____ Number of shares _____
(Attach a separate sheet if necessary)

This gift will fund a charitable account at Orchard Alliance.

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

This is a direct gift to a charity. (\$125 processing fee per gift applies. Recommended minimum gift value is \$2500 or greater.)
Provide the name and address of charity

Designation (if any) _____

Please process this gift as anonymous to the charity.

Signature _____

 _____

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 # = Phone 888-689-6300, ask for Gift Processor
Account name = The Orchard Foundation Gift Account
DTC # = 0015
EIN for Orchard Alliance = 84-1466105