OPTICA
FOUNDATION

Donation of Securities Form

The Optica Foundation welcomes gifts of securities. Before initiating a securities transfer, please return this form by emailing cgreen@optica.org, or by mail to: Optica Foundation, 2010 Massachusetts Ave, NW Washington, DC 20036 USA. The Optica Foundation EIN Number is: 71-0913500.

Donor Information:

Name (please include your spouse's name if this is a joint gift): _____

☐ You may publish my/our names, as listed above, as part of donor recognition and other organization communication.

Mailing Address: _____

Email: _____ Phone: _____

Name of Security to be donated: _____

Description of Donation (i.e. number of shares, units, etc.): _____

Date of Transfer:_____

Direct my donation to this fund (ex. Optica Foundation Annual Fund): _____

Donor Signature: _____ Spouse Signature, if applicable: _____

Date: _____

Broker Information:

Broker Company: _____

Broker Name: _____

Broker Email: _____ Broker Phone: _____

Gifts of non-publicly traded securities must be approved by the Optica Foundation Board of Directors prior to acceptance.

Receiving Firm Information:
Bank: Citibank N.A., New York
FBO: Charles Schwab & Co., Inc.
Account number: 62343919
Account Title: OSA FOUNDATION
DTC Number: 0164

If you have any questions please contact the Optica Foundation's Executive Director of Development, Cara Green, at +1.202.416.1416 or by email at cgreen@optica.org.

Contributions to the Optica Foundation, a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, are tax- deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. It is recommended that donors consult with their professional advisors to understand any legal, estate planning or tax implications or rules that may be associated with the donation. All donors receive special recognition and acknowledgments unless they request to be anonymous.