



(Sample Letter of Instruction)

DATE

Dear _____:

Please transfer from my account (no. _____) the following securities:

_____ shares of _____ Stock

_____ shares of _____ Stock

Please send these securities to Charles Schwab, DTC #0164, The Community Foundation for Greater Atlanta, Inc. for further credit to account no. 8766-6784 to benefit **The _____ Fund.**

Sincerely,

cc: Kimano Harris, Community Foundation for Greater Atlanta

******ATTENTION******

We want to provide the highest quality service from the moment you initiate your gift. To do so, we need the above information delivered to Kimano Harris (phone: 404.588.3196, fax: 404.688.3060 or email: kharris@cfgreateratlanta.org) at the Community Foundation **prior** to making the DTC transfer. We need this information for the following reasons:

1. To immediately sell the stock, we must be sure that we are the intended owner (e.g., possible electronic transfer mix-up)
2. We must know the donor's identity to immediately re-invest the assets and send the tax acknowledgement letter
3. We are not informed when gifts are received into our nine other non-Merrill Lynch institutional brokerage accounts (i.e., Schwab, Fidelity, Vanguard, Smith Barney, etc.) until we receive our month-end statements

These issues can significantly delay the sale and reinvestment of stock gifts.

We thank you in advance!