



DTC Transfer Instructions

TO: Fidelity Investments
DTC #0226

RE: For Further Credit to The Community Foundation for Greater Atlanta, Inc.
Account No. X01-521043 benefiting **"The _____
Fund"**

REQUIRED INFORMATION:

The donor will need to provide:

1. Name of stock(s) and number of shares to be transferred
Stock Name/Shares _____
2. Approximate value of shares - _____
3. Anticipated date of transfer - _____
4. Your broker's name, firm and phone number

The Community Foundation typically sells publicly traded shares one business day after it receives the shares. Without the information requested by this form there maybe a significant delay in the sale and reinvestment of stock gifts.

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 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 re-invest the assets as soon as practicable and send the tax acknowledgement letter.

We thank you in advance for helping us serve you better!

Sample Instruction Letter:

DATE: _____

(Name and address of broker)

Dear _____:

This letter serves as authorization to transfer from my account (no. _____) the following securities:

_____ shares of _____ Stock

_____ shares of _____ Stock

_____ shares of _____ Stock

Please send the securities to Fidelity Investment DTC #0226, The Community Foundation for Greater Atlanta, Inc. for further credit to account X01-521043 to benefit **The _____ Fund.**

Sincerely,

cc: Kimano Harris, Community Foundation for Greater Atlanta
191 Peachtree Street NE, Suite 1000, Atlanta 30303, facsimile: 404.688.3060
kharris@cfgreateratlanta.org