



DTC Transfer Instructions

TO: Merrill Lynch
DTC #8862

RE: For Further Credit to The Community Foundation for Greater Atlanta, Inc.
Account No. 706-04J05 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 may be 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 Cedric Smith (phone: 404.333.0101, fax: 404.688.3060 or email: csmith@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 ensure 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.

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 Merrill Lynch DTC #8862, the Community Foundation for Greater Atlanta, Inc. for further credit to account 706-04J05 to benefit **The _____ Fund.**

Sincerely,

cc: Cedric Smith
Community Foundation for Greater Atlanta
191 Peachtree Street NE, Suite 1000, Atlanta 30303, facsimile: 404.688.3060
csmith@cfgreateratlanta.org