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