



## 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"

Please note that the account number is **706 – 04J05**, and that the sixth character is the capital letter **J**.

### 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.
3. The Foundation can confirm receipt of inbound stock transfers one business day after the transferring agent executes the move through DTC. If you would like a confirmation of receipt when the shares are received, please reach out to your philanthropic officer.

**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: Bernadette Peters  
Community Foundation for Greater Atlanta  
191 Peachtree Street NE, Suite 1000  
Atlanta 30303  
Phone: 404.333.0101  
Fax: 404.688.3060  
gifts@cfgreateratlanta.org