



505 N Angier Ave NE, Suite 327  
Atlanta, GA 30308

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## 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 Every Student Every Community Fund\*\***

*\*\*legal name of the RedefinED Atlanta's fund within the Community Foundation*

### Required Information For Stock Transfers Intended To Benefit RedefinED Atlanta

The donor will need to provide:

1. Name of stock(s) and number of shares to be transferred:

Stock Name: \_\_\_\_\_

# of Shares: \_\_\_\_\_

2. Approximate value of shares: \_\_\_\_\_

3. Anticipated date of transfer: \_\_\_\_\_

4. Your broker's name, firm, and phone number:

Broker Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Phone Number: \_\_\_\_\_



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The Community Foundation typically sells publicly traded shares one business day after receiving them. 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 Melana Dickson\*\* 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 reinvest the assets as soon as practicable and send the tax acknowledgment letter.

**\*\*Melana Dickson, Staff Accountant at the Community Foundation for Greater Atlanta**

**Mailing Address:** 191 Peachtree Street NE, Suite 1000, Atlanta 30303

**Telephone:** 404.588.3212

**Email:** [mdickson@cfgreateratlanta.org](mailto:mdickson@cfgreateratlanta.org)



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## Sample Instruction Letter

DATE: \_\_\_\_\_

(Insert Name and Address of Broker)

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 Every Student Every Community Fund.

Sincerely,

\_\_\_\_\_

**CC:** Melana Dickson, Staff Accountant at the Community Foundation for Greater Atlanta

**Mailing Address:** 191 Peachtree Street NE, Suite 1000, Atlanta 30303

**Telephone:** 404.588.3212

**Email:** [mdickson@cfgreateratlanta.org](mailto:mdickson@cfgreateratlanta.org)