



# Instructions for Transferring Gifts of Stock/Securities to HOPE Atlanta

---

1. Please send written instructions (or completed broker transfer form) to your broker specifying that you wish to make a charitable contribution to Travelers Aid of Metropolitan Atlanta (dba HOPE Atlanta).

At a minimum, please include the five items below in your transfer instruction document:

- include the **issuer of the securities** (type of stock) and/or ticker symbol
  - include the **number of shares** (or the minimum gift value)
  - instruct them to transfer to **National Financial Services** account 04L-384015
  - include “**this account belongs to Travelers Aid of Metropolitan Atlanta, Federal Tax ID #58-0566247**”
  - *specifically request that the donors First and Last Name are transferred with the details, otherwise they will not release your name and we will not know how to acknowledge the gift!*
2. Your broker should transfer securities to **Travelers Aid of Metropolitan Atlanta (dba HOPE Atlanta)** via the broker account listed below.

**Broker Firm:** National Financial Services  
**Account #:** 04L-384015  
**DTC #:** 0226

3. Please notify Liz Liston so that HOPE Atlanta will expect the transfer of securities and provide the proper tax documents to you. The broker will not automatically notify Liz, so please don't omit this step when the transfer is initiated or completed. An email copy of the transfer instructions from step #1 above will suffice.

**Address:** HOPE Atlanta  
Liz Liston, Chief Development Officer  
34 Peachtree Street NW, #700  
Atlanta, Georgia 30303

**Phone:** 404.574.1689  
**email:** lliston@hopeatlanta.org

Thank you for your support of HOPE Atlanta!