



458 Ponce de Leon Avenue  
Bldg B. Terrace Level  
Atlanta, GA 30308

404 817 7070 **phone**  
404 223 0986 **fax**  
[www.hopeatlanta.org](http://www.hopeatlanta.org)

## 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 HOPE Atlanta. At a minimum, please include the five items below in your transfer instruction document:
  - a. Include the issuer of the securities (type of stock) and/or ticker symbol
  - b. Include the number of shares (or the minimum gift value)
  - c. Instruct them to transfer to Charles Schwab & Co Inc account 4640-3366
  - d. Include "this account belongs to **HOPE Atlanta, Federal Tax ID #58-0566247**"
  - e. 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 HOPE Atlanta via the broker account listed below.

Broker Firm:	Charles Schwab & Co Inc
Brokerage Firm Contact:	Charles Bullock, 404-264-1400
Account #:	04L-384015
DTC #:	4640-3366

3. Please notify Kellie Glenn, Chief Development Officer, so that HOPE Atlanta will expect the transfer of securities and provide the proper tax documents to you. The broker will not automatically notify HOPE Atlanta, 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. Here is her contact information:

HOPE Atlanta  
Kellie Glenn, Chief Development Officer  
458 Ponce de Leon Avenue  
Building B, Terrace Level  
Atlanta, GA 30308

Email: [kglenn@hopeatlanta.org](mailto:kglenn@hopeatlanta.org)

Thank you for your support of HOPE Atlanta!