



478 Lindsay Street NW  
Atlanta, GA 30314  
404.692.2067  
[OaksATL.com](http://OaksATL.com)

---

## **OaksATL Community Development Stock and Securities Gifts**

We appreciate your interest in supporting our mission to provide dignity through quality and affordable housing for English Avenue residents and surrounding Atlanta neighborhoods.

### **How to Gift Stocks/Securities**

If stock/securities are held by a brokerage firm (*most common*) take the following steps:

**Step 1:** Instruct broker to transfer the securities to:

Fidelity's Depository Trust Company (DTC): 0226

Account Name: oaksATL Community Development, Inc (EIN: 82-0811019)

Account #: Z40364475

Business Brokerage Account

Fidelity Investments

Attn: TOA Receives

PO Box 770001

Cincinnati, OH 45277-0036

**Step 2: [IMPORTANT]** When you have given these instructions for transfer, please notify [jeff.joseph@oaksATL.com](mailto:jeff.joseph@oaksATL.com) and provide the following:

- Full Name of Donor
- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction.

**Example: John Smith; 40 shares of Coca-Cola on April 15th, 2023.**

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.