



478 Lindsay Street NW
Atlanta, GA 30314
404.692.2067
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 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.