



Security Gifting Instructions

IF YOU CHOOSE TO MAKE A GIFT OF STOCK BEFORE THE END OF THE YEAR, PLEASE BEGIN THIS PROCESS BY DECEMBER 15th.

Historic Oakland Foundation Tax ID #58-1276032

Wiring securities, unlike wiring money, is not instantaneous. Please allow several days for the transaction to take place due to the large amount of transfer requests received at year end.

Please know that the **VALUE OF THE GIFT FOR TAX PURPOSES** is determined by the **date upon which the securities are deposited into Historic Oakland's account.**

In order to initiate a transfer, donors should contact David Moore by phone (404) 688-2107 or email dmoore@oaklandcemetery.com prior to this transfer and advise on the security name and quantity of shares being transferred. All Assets are custodied at Vanguard, and securities can be sent to the instructions below via DTC/electronic transfer:

DTC #0062

For further credit to Historic Oakland Foundation Inc.

For further credit to account #51599943