

ATTACHMENT II

SAMPLE LETTER TO BROKER TO TRANSFER MUTUAL FUND SHARES

Date

(Broker Name)

Attn: (Broker Contact Name)

(Broker Address)

(Broker City, State, Zip)

Re: (Donor's Brokerage Account Number)

Dear (Broker Contact Name):

It is my desire to transfer as a gift _____ shares of (Name of Mutual Fund) held in my account. Please follow this letter of instruction and transfer the shares into the following account held at (Name of Mutual Fund Company):

Truist Bank, Atlanta as Custodian for Archdiocese of Atlanta

Account Registration Name:

Account #:

Thank you for your assistance.

Sincerely,

(Donor Name)