



Letter of Instruction

The Letter of Instruction (LOI) is required if you are transferring securities or mutual funds. This Letter of Instruction is not required if you are transferring cash or physical stock certificates*.

Instructions

Please follow the instructions below

- Complete Letter of Instruction along with Application or Contribution Form
 - > Send **Copy** of the LOI to ImpactAssets
 - > Send **Original** LOI and Medallion Signature Guarantee to firm holding the securities.
- You **MUST** return a copy of the completed LOI to Giving Assets before initiating a securities transfer to ensure your account is properly credited.
- Send LOI to ImpactAssets, c/o Calvert Foundation, 7315 Wisconsin Avenue, Suite 1100W Bethesda, MD 20814. Telephone: 800.248.0337. Fax: 301.280.6061

Note:

- (The Medallion Signature Guarantee may not be required by all securities firms in order to initiate your transfer. You should contact your particular firm for their requirements.)
- *Physical stock certificates may require a **Third Party Release Form** and additional paperwork (please call 800.248.0337 for additional information).
- Shares should be transferred in kind and are not to be liquidated.



Account Information

Holding Firm Information

Name of Company

Firm Mailing Address

Daytime Telephone

City State Zip

*Please note that some securities firms may not be able to transfer Mutual Fund holdings directly to the Charles Schwab & Co, Inc. Account listed above. If you encounter this situation, please contact a Giving Assets, Inc. Associate and we will assist you in facilitating the transfer.

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm to ImpactAssets, Inc.

From: _____
Account Number Account Name

- _____ shares of _____
Number Name of Securities
- _____ shares of _____
Number Name of Securities
- _____ shares of _____
Number Name of Securities
- _____ shares of _____
Number Name of Securities

Please deliver all eligible securities to:

DTC#: 0164, Code 40
 Custodian: Charles Schwab & Co, Inc.
 Beneficiary Account Name: ImpactAssets, Inc.
 Beneficiary Account Number: 7835-8108

Signatures

Signature

Name (Please Print)

_____/_____/_____
Date

Social Security No. of Owner

Signature of Authorized Officer

_____/_____/_____
Date

Name of Institution and Title