

THE COLONIAL WILLIAMSBURG FOUNDATION

INSTRUCTIONS FOR TRANSFER OF SECURITIES VIA DEPOSITORY TRUST COMPANY (DTC)

Thank you for your generous support of Colonial Williamsburg. To ensure a smooth transfer of the stock you are contributing, please take the following steps:

1. Let your broker know you would like to transfer shares as a charitable gift to Colonial Williamsburg. Identify the type and number of shares you would like to contribute. (Your broker may require instructions *in writing – with a signature guarantee*).
2. Provide your broker the exact transfer instructions below:

Wells Fargo Advisors DTC #141
Account Name: Colonial Williamsburg Foundation
Reference Account No. 2372-4100
Joseph W. Montgomery, Broker No. WB04
Attn: The Optimal Service Group of Wells
Fargo Advisors (757) 220-1782
From: [Your name] *

***IMPORTANT – Your broker must include your name when stock is transferred to Colonial Williamsburg via DTC. Without that information, we have no way to identify and acknowledge your gift.**

3. Please notify Colonial Williamsburg of your stock gift so that we can assure proper receipt of your contribution in our account at Wells Fargo Advisors. Contact information is as follows:

Peggy McGraw, Special Gifts Administrator
The Colonial Williamsburg Foundation
P.O. Box 1776
Williamsburg, VA 23187-1776

Tel. (757) 565-8605
mmcgraw@cwf.org

4. Any additional questions your broker may have regarding delivery should be directed to Emily Sporrer at Wells Fargo Advisors. Her number is (757) 220-1782.

***THANK YOU AGAIN FOR YOUR GENEROUS CONTRIBUTION
TO COLONIAL WILLIAMSBURG***