

## Letter of Instruction

The Letter of Instruction (LOI) is required if you are transferring securities or mutual funds.

## Instructions

- Send the **Original LOI** with Medallion Signature Guarantee to the firm currently holding the securities.
- Send a **Copy of the LOI** with Application or Contribution Form to:

ImpactAssets  
c/o Calvert Foundation  
7315 Wisconsin Avenue, Suite 1000W  
Bethesda, MD 20814  
Telephone: 855.482.2946  
Fax: 301.263.7998

## Note:

- The Medallion Signature Guarantee, and in some cases a Notarized Signature, may be required by some securities firms in order to initiate your transfer. You should contact your particular firm for its requirements. If required, a Medallion Signature Guarantee or Notarized Signature may be obtained at most financial institutions.
- Physical stock certificates may require a **Third Party Release Form** and additional paperwork. Please contact us for additional information
- Please note that some securities firms may be unable to transfer Mutual Fund holdings directly to the Charles Schwab & Co, Inc. account listed below. If you encounter this situation, please contact ImpactAssets and we will assist you in facilitating the transfer.
- Shares should be transferred in kind are not to be liquidated until received by ImpactAssets.



## Account Information

### Holding Firm Information

|                                      |   |
|--------------------------------------|---|
| _____<br>Name of Firm Holding Assets | _____<br>Account Number                     |
| _____<br>Name(s) on Account          | _____<br>First Telephone Number             |
| _____<br>Firm Mailing Address        | _____<br>Firm Mailing City, State, Zip Code |

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

|                           |  |  |
|---------------------------|--|--|
| _____<br>Number of Shares | _____<br>Name of Securities (Symbol if Applicable) | _____<br>Approximate \$ Value              |
| _____<br>Number of Shares | _____<br>Name of Securities (Symbol if Applicable) | _____<br>Approximate \$ Value              |
| _____<br>Number of Shares | _____<br>Name of Securities (Symbol if Applicable) | _____<br>Approximate \$ Value              |
| _____<br>Number of Shares | _____<br>Name of Securities (Symbol if Applicable) | _____<br>Approximate \$ Value              |
|                           |  | _____<br><b>Approximate \$ Total Value</b> |

### ImpactAssets Brokerage Account Information:

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

### Signatures

|                    |                              |               |
|--------------------|------------------------------|---------------|
| _____<br>Signature | _____<br>Name (Please Print) | _____<br>Date |
|--------------------|------------------------------|---------------|

\_\_\_\_\_  
Social Security No. of Owner

### Medallion Signature Guarantee – ONLY If Required (See Instructions)

|  |               |
|--|---------------|
| _____<br>Signature of Authorized Officer | _____<br>Date |
| _____<br>Name of Institution and Title   |               |

*Note: If a Notarized signature is required by the securities firm, please attach a Notarial Certificate.*