

Berkshire Taconic Community Foundation serves as a clearing agent for gifts of stock to the Mahaiwe. Please fill out this form, and notify Diane Wortis at [diane@mahaiwe.org](mailto:diane@mahaiwe.org) upon submission.

## DTC Eligible Securities Transfer Instructions

Before Transferring Assets, Berkshire Taconic Community Foundation must be notified by email [finance@berkshiretaconic.org](mailto:finance@berkshiretaconic.org), telephone (413.229.0370) or by fax (413.229.0329) of the following information or Wilmington Trust will not accept the transfer.

Donor's name:

Address:

City:

State:

Zip:

Phone #:

Security name(s):

Number of shares:

Approximate Value: \$

Donation to which fund at Berkshire Taconic:

Fund

Brokerage firm name:

Brokerage DTC No.:

Contact person:

Contact telephone number:

### Bank Transfer Instructions

To: M&T Bank  
285 Delaware Avenue, 3rd Floor  
Buffalo, NY 14202

DTC No.: 990

Account No.: 120234-001  
Berkshire Taconic Community Foundation – Gift Account

Attn: Rachel Schlee

Contact: Please contact Rachel Schlee at 716-842-5211 or [rschlee@wilmingtontrust.com](mailto:rschlee@wilmingtontrust.com) if you should have any trouble with this transfer.

### Berkshire Taconic Community Foundation

800 North Main Street, Sheffield, MA 01257-9503

T: 413.229.0370 F: 413.229.0329 [info@berkshiretaconic.org](mailto:info@berkshiretaconic.org) [www.berkshiretaconic.org](http://www.berkshiretaconic.org)