

DTC Eligible Securities Transfer Instructions

Before Transferring Assets, Berkshire Taconic Community Foundation must be notified by email finance@berkshiretaconic.org, telephone (413.229.0370) or by fax (413.229.0329) of the following information or State Street Bank & Trust will not accept the transfer.

Donor's name: _____

Security name(s): _____

Number of shares: _____

Donation to which fund at Berkshire Taconic: _____ Fund

Brokerage firm name: _____

Brokerage DTC No.: _____

Contact person: _____

Contact telephone number: _____

Bank Transfer Instructions

To: State Street Bank & Trust

DTC No.: 2319

Agent Account No.: 020408436008

Berkshire Taconic Community Foundation

Gift Account

Contact: Please contact Brandon Wilber at State Street via email:
KCSEINonProfit@StateStreet.com if you should have any trouble with this transfer

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org