

# 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 State Street Bank & Trust will not accept the transfer.

Donor's name: \_\_\_\_\_

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: 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](mailto: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](mailto:info@berkshiretaconic.org) [www.berkshiretaconic.org](http://www.berkshiretaconic.org)