



BART

a college prep charter school

BART Charter Public School Stock Donation Form

Date: _____

Broker Name: _____

Broker Address: _____

Broker Phone Number: _____ Contact Person: _____

Dear Broker, Please accept this letter as your authorization to irrevocably transfer:

Name of Equity (Stock, Bond, Mutual Fund, etc): _____ Symbol: _____

Number of Shares: _____

Cusip Number: _____ ISIN Number: _____

Account Number: _____

Please transfer to the following account:

Berkshire Arts & Technology
Corporate Acct. # 588-10898-1-6
Edward Jones
c/o Karen Kettles
1 Berkshire Square, Ste. 114
Adams, MA 01220
413-743-0552 / 800-811-8617

Donor Information:

Individual Name/Organization: _____

Address: _____

City, State, ZIP Code: _____

Phone number: _____ E-mail address: _____

Signature & Date: _____

Please notify us if an equity donation or transfer has been initiated by contacting Martha Mellor, Business Manager, at 413-743-7311 ext. 128, or at martha.mellor@bartcharter.org. Please call Martha if you have any questions or need additional information.

By donating appreciated stocks, bonds, and mutual fund shares that have been owned for more than one year, U.S. supporters of BART Charter Public School can completely avoid capital gains tax. They also receive an income tax deduction for the fair market value of the gift. (Donors from other countries should consult with a tax authority to determine whether or not their gift of equities is tax deductible.)

Thank you! Your support is very important to us!