

FUND ADVISOR CHANGE FORM

To revise the Fund Advisor or other contacts, email the completed form to info@berkshiretaconic.org or fax to 413.229.0329. Use an additional sheet as needed.

Fund Name: _____

Fund Advisor

(Primary contact, receives financial statements and has permission to sign off on disbursements out of the fund)

Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Email: _____

Daytime Phone: _____ Fax: _____

New Advisor Signature: _____ Date: _____

NOTE: To process this request, this form must be signed by the new fund advisor

Notification of Donations

(The person to whom notification of incoming donations is sent; can be the fund advisor named above)

Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Email: _____

Daytime Phone: _____ Fax: _____

Additional person authorized to sign off on disbursements out of the fund

Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Email: _____

Daytime Phone: _____ Fax: _____

Authorized Signature: _____ Date: _____

NOTE: To process this request, this form must be sent from the current fund advisor

Please complete, sign and return to:

Berkshire Taconic Community Foundation

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

t: 413.229.0370 f: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org