

# 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 fax (413.229.0329) of the following information or Wilmington Trust will not accept the transfer.

**DONOR'S NAME** \_\_\_\_\_

Local Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Business Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Security Name(s) \_\_\_\_\_

Number of Shares \_\_\_\_\_

Approximate Value \$ \_\_\_\_\_

Berkshire Taconic Fund Receiving Donation \_\_\_\_\_

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.: Ryanne DiMillo

Contact: Please contact Ryanne DiMillo at 716.839.8722 or [rizzo@wilmingtontrust.com](mailto:rizzo@wilmingtontrust.com) if you should have any trouble with this cash transfer.