

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 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.: Rachel Schlee

Contact: Please contact Rachel Schlee at 716.842.5211 or rschlee@wilmingtontrust.com if you should have any trouble with this cash transfer.