

FINANCIAL TRANSFER INSTRUCTIONS

The Community Foundation welcomes gifts of securities, mutual funds, wire and bank transfers. In advance of a transfer of assets held by a broker, please notify Bianca Walker, Philanthropy Officer at bwalker@communityfoundation.org or 413-417-6401 so that we can readily acknowledge your gift.

For transfers using a broker, please provide us with:

1. the name of the security/mutual fund being donated
2. the number of shares
3. your broker's phone number/contact information
4. the charitable fund at the Foundation to be credited with the gift.

Securities

Once you have contacted the Foundation, please instruct your broker to transfer the securities or mutual funds. Your broker will need the following information:

Account Name: Community Foundation of Western Massachusetts (via Vanguard)
Brokerage Account #: 73374986
Vanguard DTC #: 0062

If you have any questions regarding the transfer of securities, please contact your broker.

Mutual Funds

Please contact Bianca Walker to discuss how best to transfer mutual funds to the Foundation.

Wire

Bank of America ABA #: 0260-0959-3
Address: Bank of America Corporate Center
100 North Tryon Street, Charlotte, NC 28255
Account Name: Community Foundation of Western Massachusetts
Checking Account #: 009356752298

Automated Clearing House (ACH)

Bank of America ABA #: 011000138
Address: Bank of America Corporate Center
100 North Tryon Street, Charlotte, NC 28255
Account Name: Community Foundation of Western Massachusetts
Checking Account #: 009356752298

Thank you for choosing the Community Foundation of Western Massachusetts as your charitable partner.

10/2020