

## 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 Didi de Almeida, Accounting Manager at [dalmeida@communityfoundation.org](mailto:dalmeida@communityfoundation.org) so that we can readily acknowledge your gift.

For transfers, 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. 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 Debbie Koske 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