

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 Keith McKittrick, Director of Philanthropic Operations kmckittrick@communityfoundation.org or by 413-417-6384 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 and Mutual Funds

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.

Thank you for choosing the Community Foundation of Western Massachusetts as your charitable partner.
02/24/2023