

DTC Eligible Securities Transfer Instructions

Before transferring assets, you must notify Berkshire Taconic Community Foundation by submitting the form below via email to finance@berkshiretaconic.org. Without this notification, M&T Bank will not accept the transfer. If you have any questions or concerns, please call 413.229.0370.

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.: **0990**

Account No.: **120234-000 Berkshire Taconic Community Foundation – Cash Account**

Attn.: **Christopher Young**

Contact: **Please contact Christopher Young at 716.842.5207 or cyoung4@wilmingtontrust.com if you should have any trouble with this transfer.**

Please note, Wilmington Trust is a wholly-owned subsidiary of M&T Bank (Manufacturers and Traders Trust Company)

REVISED FEB. 2025