Procedure for donation of stock to an Episcopal parish, diocese or other organization with assistance of the Trustees for the Diocese of Western Massachusetts

Please complete the following form and submit it to the Trustees’ Executive Director before transferring assets:

Date _______________________________

Name of Donor ______________________________________________ ________________

Address ____________________________________________________________________  

Street                                                                 City  
State        ZIP

Stock Name __________________________________________ Number of Shares ________________

Gift given to ________________________________________________________________  

Name of Episcopal parish, diocese or other organization

Address ____________________________________________________________________  

Street                                                                 City  
State        ZIP

Proceeds are to be ____ sent to the Episcopal parish, diocese or other organization or
Please check one. ____ invested with the Trustees for the Diocese of Western Massachusetts for the benefit of a parish of the diocese, the Diocese of Western Massachusetts or other organization of the diocese

If proceeds are to be invested with the Trustees, indicate (existing or new) fund name:

___________________________________________________________________________

Attached are wiring instructions to the Trustees’ custodian, Bank of America.