



SECURITIES TRANSFER (DTC) FORM*

STEPS

1 Please complete this form and forward it to your banker or financial advisor.

2 Donor information does not always transmit. Please also forward a copy of this form to Baystate Health Foundation via email at BHF@BaystateHealth.org, fax at 413-794-7729, or mail at Baystate Health Foundation 280 Chestnut Street Springfield, MA 01199

If you have any questions, please reach out to Baystate Health Foundation at 413-794-5444 or BHF@BaystateHealth.org

DATE

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

FAX

DONOR NAME

DONOR STREET ADDRESS

CITY | STATE | ZIP CODE

NAME OF SECURITY

NUMBER OF SHARES

PLEASE LIST ADDITIONAL NAME FOR JOINT RECOGNITION

I wish to make a charitable contribution to Baystate Health Foundation, Inc., for the purpose of:

SIGNATURE

DTC Transfer Instructions for Bankers & Financial Advisors

Wire transfers for gifts of securities to Baystate Health Foundation should be sent to:

Bank: The Northern Trust Company
DTC Number: 2669
Agent Bank: 20290
For further credit to: Baystate Health Foundation Account number: 4475648

Our Representatives at Northern Trust are:

Allen Wu: 312-557-4027
AW69@ntrs.com

Northern Trust Client Services:
312-444-5453
PEI_ARA@ntrs.com

Important

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition

* If your bank or broker holds your securities, please use this form to transfer a gift of securities via the Depository Trust Company (DTC) system.