

## Trustees for the Diocese of Western Massachusetts

37 Chestnut Street  
Springfield, Massachusetts 01103

Norman G. "Mick" Kalber  
Executive Director

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### 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.*