



Gifts of Stock and Securities

Donating stock that has been owned for more than one year can provide attractive tax benefits while helping to protect the river. Thank you!

It is important for us to be notified prior to every stock transfer, in order for us to accurately identify, allocate and acknowledge your gift. Please contact Corey Kurtz at 413-772-2020, ext. 202 or by e-mail at ckurtz@ctriver.org. **Transfer instructions for your broker are on the following page.**

Contributor	
Your Name	
Phone number	
Address	
E-mail	
Gift Designation	
Unrestricted	
Designated for	
Gift Details	
# of shares	
Security Name	
# of shares	
Security Name	
# of shares	
Security Name	
Expected Date of Transfer	
This gift will be matched by:	
Is this a transfer from your IRA? (For donors at least 70 ½ years old)	Yes/No
Broker Information	
Name of Brokerage or Bank	
City	
Broker Name	
Broker Phone	

The effective date of gift will be the date your gift is received in CRC's account.



Gifts of Stock and Securities Delivery Instructions

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DELIVERY INSTRUCTIONS

Morgan Stanley

Attn: Stephen Calderara
35 Village Road, Suite 601
Middleton, MA 01949-1202

DTC Deliveries

DTC Participant #0015
Acct # 473-049118-008
Acct Name: Morgan Stanley
FFC: Conn River Watershed Council Gifting Account

Please CALL Morgan Stanley directly for assistance with a transfer of MUTUAL FUNDS or items which are NOT DTC eligible:

Stephen Calderara: (978)739-9652

Paper certificates may be mailed directly to CRC:

Connecticut River Conservancy, Attention: Development Office
15 Bank Row
Greenfield, MA 01301
413-772-2020

Securities may be endorsed in blank (the donor's signature only) and sent to the above address. If stock certificates are unendorsed, please send a stock power, on which the signature only has been filled, under separate cover. If you receive DRS statements rather than paper certificates, these can be processed electronically.