

GIFT OF STOCK DONATION FORM



Thank you for your support! Please use this form to make a donation to CRWA in the form of stock. CRWA has a brokerage account firm to facilitate the transfer of stock. When stock donations are transferred directly to CRWA's brokerage account, they arrive without donor information. The information you provide below is essential for CRWA to correctly identify your contribution with the stock being transferred.

Please send copies of this to 1) your broker and 2) CRWA. For questions, please contact Suzanne Carleo, CRWA Controller at scarleo@crwa.org or call 781.788.0007 x223.

NAME (AS IT SHOULD APPEAR ON CRWA'S ANNUAL REPORT)

ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

NAME OF DONOR BROKERAGE FIRM

BROKER NAME

PHONE

COMPLETE NAME OF SECURITY

NUMBER OF SHARES

/ /

STOCK SYMBOL

REQUESTED DATE OF TRANSFER

SPECIAL INSTRUCTIONS

PLEASE RETURN FORM TO:

CRWA'S BROKERAGE FIRM INFO:

Charles River Watershed Association
ATTN: Suzanne Carleo, Comptroller
190 Park Road, Weston, MA 02453
Phone: 781.788.0007 x223
Fax: 781.788.0057
Email: scarleo@crwa.org

Matthew R. Williams
RBC Wealth Management
9 Trafalgar Square, Nashua, NH 03063
Phone: 603.577.4908
Email: matt.williams@rbc.com

PLEASE NOTE:

If sending by fax, please contact Suzanne at scarleo@crwa.org or call 781.788.0007 x223.

Account Info:
Charles River Watershed Association
DTC #: 0235
Account #: 301-01785
TAX ID #: 04-6136989

For Staff Use Only:

Staff Name: _____ Project #: _____ Receipt of completed form: Project Manager Database Finance