

**MASSACHUSETTS COLLEGE OF LIBERAL ARTS FOUNDATION, INC.**

**INSTRUCTIONS FOR DONATING SECURITIES**

**Gift Valuation**

The value of the stock for IRS and MCLA gift recording purposes is the average of the reported high and low on the date received by the Foundation's broker, MountainOne Investment Group.

**Donating Securities Held by Your Broker**

When you notify your broker of your intent to donate, we ask that you also notify the Foundation so that we can anticipate a transfer to our account. To advise MCLA Foundation, please e-mail Marc Morandi at M.Morandi@MCLA.edu or call (413) 662-5221 or toll free at (888) 677-6252.

Your broker can directly transfer the securities to our account at MountainOne Investment Group, 296 Main Street, Williamstown, MA 01267 using the following transfer instructions:

Securities can be transferred to:

National Financial Services  
29 Sawyer Road  
Waltham, MA 02453

DTC # 0226

(For Further Credit to the Account of:  
Massachusetts College of Liberal Arts Foundation, Inc.)  
Account #HDQ758345

Other information that might be needed include:

Broker	Commonwealth Financial Network
Representative	Rob Abel (413) 458-1805

MCLA Foundation's Federal Tax ID #04-2613803

If you notify your broker in writing, please send a copy to:

Marc Morandi  
Massachusetts College of Liberal Arts Foundation, Inc.  
375 Church Street  
North Adams, MA 01247

**Donating Physical Security Certificates That You Hold**

Sending or delivering physical security certificates that you hold requires additional forms that require guaranteed signatures of all owners named on the certificates. Before mailing or delivering security certificates please contact Marc Morandi for assistance via e-mail at M.Morandi@MCLA.edu or calling (413) 662-5221 or toll free at (888) 677-6252.