

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 the reported low on the date received by the Foundation's broker, True North Financial Services.

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 call Marc Morandi at (413) 662-5221 or toll free at (888) 677-6252.

Your broker can directly transfer the securities to our account at True North Financial Services, 795 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
Advancement Operations Officer
Massachusetts College of Liberal Arts Foundation, Inc.
375 Church Street
North Adams, MA 01247

MASSACHUSETTS COLLEGE OF LIBERAL ARTS FOUNDATION, INC.

INSTRUCTIONS FOR DONATING SECURITIES CONT'D

Donating Physical Security Certificates That You Hold

Send or deliver the **unendorsed** certificate with a signed letter (example attached-signature must be guaranteed) by registered mail to the attention of Marc Morandi at the address listed above.

The cost of replacing a lost certificate is usually 2% of the current value of the shares represented by the certificate, you may want to consider insuring this package with the postal service for this amount.

A stock power with your signature (preferably guaranteed as well) must be sent in a **separate envelope** by first class mail to Marc Morandi's attention at the address listed previously. This is a security measure in the event of lost certificates. Our broker can fax stock powers to you. Please call True North at (413) 458-1805 or Toll Free at (888) 878-6784 for assistance. Each stock certificate requires a separate stock power. The stock power **must** be signed exactly as the name(s) appear on the certificate(s) and by all owner(s) named on the certificate.

MASSACHUSETTS COLLEGE OF LIBERAL ARTS FOUNDATION, INC.

INSTRUCTIONS FOR DONATING SECURITIES CONT'D

Sample Letter Authorizing Gift of Securities:

John Smith
1 Main Street
Anywhere, MA 00000

Date

National Financial Services
29 Sawyer Road
Waltham, MA 02453

RE: Massachusetts College of Liberal Arts Foundation, Inc.

To Whom It May Concern:

Please be advised that I am donating *(number)* shares of *(Company Name)* stock, as represented by stock certificates *(list stock certificate numbers)* to the Massachusetts College of Liberal Arts Foundation, Inc. 375 Church Street, North Adams, Massachusetts.

Thank you for your assistance with this transfer.

Sincerely

Signature(s) should match registration of certificate(s)

(Your name printed here)

- Letter must be signature guaranteed. Your bank should be able to do this for you at little or no charge.

If you have any questions or need assistance with the transfer, please feel free to contact Rob Abel, True North Financial Services at (413) 458-1805 or toll free at (888) 878-6784. Thank you for supporting our efforts.