

Educational Foundation for Rockport

Stock or Mutual Fund Transfer Instructions

Once you have provided the delivery instructions to your financial advisor, please notify [Jim Gutstadt, Treasurer](#), in advance of any security transfers so that proper acknowledgment may be made. If you have any questions, please call [\(978\) 290-1712](#) or e-mail this form to jimgutstadt@yahoo.com.

DTC (Depository Trust Company) Electronic Delivery

DTC ID #0226 – for credit to:

Educational Foundation for Rockport

Account # Z42-094757 at:

Fidelity Investments

PO Box 770001, Cincinnati, OH 45277-0002

TAX ID # 04-3214141 Educational Foundation for Rockport

DONATION INFORMATION

Date of transfer _____

Number of shares and type of stock (*name*) _____

Name of donor(s) _____

Address _____

City _____ State _____ ZIP _____

Phone number(s) _____ Email _____

Please return completed form to:

Educational Foundation for Rockport

P.O. Box 836

Rockport, MA 01966



Jim Gutstadt, Treasurer | jimgutstadt@yahoo.com