

Gift Instructions for Embrace Boston

Please use the following instructions for the transfer of gift assets. In order to facilitate processing and acknowledgment, be sure to include the donor's name and give advance notice of any gift by calling (617) 338-2213 or emailing lisa.berk@tbf.org. For information about transferring assets from charitable funds or gifting other non-cash assets, please call.

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| Checks | <p>Make checks payable to "Boston Foundation, Inc.," and note "Embrace Boston" in the memo field. Mail to:</p> <p>The Boston Foundation PO Box 843027 Boston, MA 02284-3027</p> |
| DTC-Eligible Securities | <p>Stifel Nicolaus & Company DTC # 0793 125 High Street, 29th Floor Boston, MA 02110 Account Name: Boston Foundation, Inc., Account # 7218-3084 <i>Please include the donor's name and "Embrace Boston"</i></p> <p>Please send notification to expect securities. Contact: Lisa Berk at (617) 338-2213 or lisa.berk@tbf.org</p> |
| Cash Wires | <p>Bank of America, One Bryant Park, New York, NY 10036 ABA # 026009593 Account: Stifel Nicolaus & Company, Account #4451211800 For further credit to: Account Name: Boston Foundation, Inc., Account # 7218-3084 <i>Please include donor's name and "Embrace Boston".</i></p> <p><i>** ABA and both account numbers are required. Wires received without this information will be returned to sender.</i></p> |
| ACH Bank Transfers | <p>Eastern Bank, 195 Market Street, Lynn, MA 01901 ABA # 011-301-798 Account Name: Boston Foundation - Incoming ACH Account # 60-1679756 <i>Please insert donor's name in the addenda field.</i></p> <p>Please send notification to expect ACH. Contact: Lisa Berk at (617) 338-2213 or lisa.berk@tbf.org</p> |
| Interests in Private Assets | <p>Please contact Donor Services at (617) 338-2213 or email donorservices@tbf.org to discuss.</p> |
| Mutual Funds | <p>Contact us at (617) 338-2213 or email fundadmin@tbf.org for instructions.</p> |
| Cryptocurrency | <p>Please contact your relationship manager or Lory Lannon at (617) 338-4453 or lory.lannon@tbf.org for instructions.</p> |