



Steep Rock Association, Inc. (SRA) Gifting Instructions

Important Steps to Complete a Donation

It is important that we are notified prior to every transfer so we can accurately identify, allocate, and acknowledge your gift.

1. Request the donation through your financial advisor or bank.
2. Notify Steep Rock Association via email (gifts@steeprocksoc.org) as donor information does not always transmit through DTC and wiring systems. Requested information is included below.
3. Questions? Contact SRA at 860-868-9131 or email gifts@steeprocksoc.org.

Marketable Securities Stock Transfers via DTC:

Charles Schwab
DTC: 0164
Credit to:
Steep Rock Association, Inc.
Reserve Account A/C # 6547-7676

Contact:

Bradley, Foster & Sargent, Inc.,
Gina C. Alderucci, 860-241-4888

Inbound Domestic Wire Information

Bank Name: **National Iron Bank**
Bank Address: 195 Main Street, Salisbury CT
Routing Number: 011102638
Beneficiary Name:
Steep Rock Association, Inc.
Beneficiary Address: 116 Christian Street
New Preston, CT 06777
Beneficiary Account Number: 600585189

Important: For proper donor recognition, transfers **must** include Donor name and address, name of security and number of shares, purpose of gift, and, if applicable, additional names for joint recognition.

Information to be Shared with Steep Rock Association

DONOR NAME

NAME OF SECURITY / # OF SHARES (IF GIFTING SHARES)

ADDRESS

AMOUNT OF WIRE TRANSFER (IF GIFTING CASH)

CITY, STATE, ZIP CODE

GIFT PURPOSE

TELEPHONE

WHO, IN ADDITION TO LEGAL DONOR, SHOULD RECEIVE
RECOGNITION FOR THIS GIFT?

Steep Rock Association, Inc.
P.O. Box 279
Washington Depot, CT 06794
gifts@steeprocksoc.org
860-868-9131