



STOCK OR MUTUAL FUND GIFT TRANSFER

It is important you notify us in advance of any stock or mutual fund transfer so we are able to properly track and acknowledge your gift. Please contact Director of Philanthropy Michelle Handke at 231.935.1514 x4 or mhandke@gtbay.org with the following information:

Donor Name

Stock or Mutual Fund Name, Ticker Symbol, and Number of Shares

Anticipated Transfer Date

Investment Advisor Contact Name, Phone Number, and Email Address

To assist you with your transfer, it is important to note that our legal name is Grand Traverse Bay Watershed Initiative (DBA The Watershed Center Grand Traverse Bay) and tax id #38-3198787.

For DTC Eligible Stocks and Bonds:

DTC Participant ID: 0226

Account #: 671-304050

For Benefit of: Grand Traverse Bay Watershed #671-304050 and donor name

For Wires/ACH:

J.P. Morgan Chase Bank, NY

ABA: 021000021

Account #: 066196-221

For Benefit of: Grand Traverse Bay Watershed #671-304050 and donor name

For Checks:

The Watershed Center Grand Traverse Bay

13170 S. West Bay Shore Drive

Traverse City, MI 49684

For all gifts, please provide the donor name for proper acknowledgement and receipt.