



COMMUNITY FOUNDATION of Southeastern Massachusetts

Gift Transmittal Form

(to a Field of Interest Fund in trust form)

1.) Name _____

Address _____

Telephone _____

2.) "I give the sum of \$ _____ / the following described property

(description of assets given) to the **Community Foundation of Southeastern Massachusetts** with the request that the funds thus transferred be used to establish a fund, to be known as the _____ (name fund), and to be used to make grants to nonprofit organizations engaged in the following charitable and educational activities in the Southeastern Massachusetts area:

_____." (for example, sheltering the homeless, aiding the elderly, offering programs in the performing arts, etc.)

3.) The objective selected for investing the assets held by the fund will be:

- _____ balanced _____ current use
- _____ high income (with the agreement of the Foundation)

4.) Distributions will be made from:

- _____ income only _____ income and principal

5.) The gift or property described above will be transferred to the **Community Foundation of Southeastern Massachusetts** by using the following method:

- _____ check _____ securities--electronic transfer
- _____ securities--certificates transfer other _____
- _____ securities--gift account transfer _____

(signature)

(date)