



## Catawba Lands Conservancy

### *Stock & Mutual Fund Donation Instructions*

Thank you for your support of Catawba Lands Conservancy! The Conservancy holds an account at Queens Road Securities for the purpose of receiving donor gifts. If you have questions relating to the donation process, please contact Dean Thompson at 704.342.3330, extension 218.

**Step 1:** Please contact your broker and instruct them to electronically transfer a specific security to the following Catawba Lands Conservancy account:

#### Queens Road Securities

**Contact:** Benton Bragg, 704-377-0261  
100 Queens Road  
Charlotte, NC 28204

**DTC:** #0443

*Physical stock certificates* may be delivered to a Queens Road Securities representative. The owner(s) of the shares must sign the stock/bond power while present.

*Mutual Funds* must be specifically identified. If the fund is held at a mutual fund company, please contact the company and follow their instructions for transfer. If the fund is held at a brokerage firm, please provide the Conservancy's Queens Road Securities account information as listed above.

**Step 2:** Please complete the following form, and return it to:

Catawba Lands Conservancy  
Attn: Dean Thompson  
105 W. Morehead Street  
Charlotte, NC 28202  
*Fax:* 704.342.3340  
*Email:* dean@catawbalands.org

*Please note that all securities gifts will be sold upon receipt in accordance with Catawba Lands Conservancy's policies. The Conservancy will value the donation based on the actual stock price on the date of receipt.*



## Catawba Lands Conservancy

### *Securities Gift Notification Form*

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Stock or Mutual Fund Donation: \_\_\_\_\_

Number of Shares Donated: \_\_\_\_\_

Anticipated Value of Donated Shares: \_\_\_\_\_

Date of Gift: \_\_\_\_\_

Please return this form to:

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*Email:* dean@catawbalands.org