



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 Catawba Lands Conservancy account held at Queens Road Securities.

Queens Road Securities

Contact: Bragg Financial Advisors
704-377-0261
1031 S. Caldwell Street, Suite 200
Charlotte, NC 28203

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: _____

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