



**- CATAWBA -**  
LANDS CONSERVANCY  
LAND | WATER | FARMS | NATURE

## **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:

Alesia DiCosola, Development Director  
704.342.3330, extension 205; [alesia@catawbalands.org](mailto:alesia@catawbalands.org)

### **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  
1031 S. Caldwell Street, Ste. 200  
Charlotte, NC 28203  
(704) 377-0261

Account Name: Catawba Lands Conservancy  
DTC Number: 0443  
Account Number: 5QR402486

Physical stock certificates may be delivered to a Queens Road Securities representative. Please inform the representative that you would like to make a gift to Catawba Lands Conservancy, and request that the representative contact the Conservancy's broker. 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 CLC's Queens Road Securities account information that's listed above.

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

Catawba Lands Conservancy  
Attn: Alesia DiCosola  
4530 Park Road, Suite 420  
Charlotte, NC 28209  
Email: [alesia@catawbalands.org](mailto:alesia@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.*



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## 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:

Catawba Lands Conservancy  
Attn: Alesia DiCosola, Development Director  
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Charlotte, NC 28209  
Fax: 704.342.3340  
Email: [alesia@catawbalands.org](mailto:alesia@catawbalands.org)