



## Asset Delivery Instructions – Donations to Davidson Lands Conservancy (DLC)

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### Donating Cash

Always provide any special instructions for your gift, such as directing the funds to a special purpose like the Forever Fund, TreesDavidson or other DLC fund or initiative. Unspecified donations are used for operating funding.

**By Check:** Mail a written check to our office with any special instructions in the memo line. Make check payable to:

Davidson Lands Conservancy  
P.O. Box 1952  
Davidson, NC 28036

**By Credit or Debit Card:** Donations can be made on-line at [davidsonlands.org](http://davidsonlands.org).

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### Donating Securities

Direct your broker to deliver securities to the account listed below. Please contact Heather Pitman with Bragg Financial Advisors at 704-714-7726 ([hpitman@braggfinancial.com](mailto:hpitman@braggfinancial.com)) with questions about transferring securities. ***It is important that you or your broker inform Heather Pitman at Bragg Financial or DLC Executive Director Dave Cable (704-892-1910) of the pending gift, the donor(s) name(s), and special instructions on how the donation is to be recognized.***

Brokerage Firm: Pershing Advisor Solutions, LLC

Investment Advisor: Bragg Financial Advisors  
1031 South Caldwell Street, Suite 200  
Charlotte, NC 28203

Account Name: Davidson Lands Conservancy

Account #: 5QR-401629

DTC#: 0443 (clearing through Pershing, LLC)

The estimated value of a gift of securities is based on the fair market value on the date the security is received into the DLC brokerage account. The fair market value is the mean between the highest and lowest selling prices on the date received. Please consult your tax advisor regarding the tax implications of your gift.

Davidson Lands Conservancy's Federal Tax ID is 56-2218814.

Thank you for supporting Davidson Lands Conservancy!