

GIFTS OF STOCKS AND SECURITIES

We are grateful for your support of Davidson College. Prior to making a gift of securities, especially if gifting mutual funds, please notify:

Dawn Smith
Planned Gift Administrator
704-894-2103 (voice)
704-894-2468 (fax)
dasmith@davidson.edu

Dawn needs to know:

Who is the donor?
What stock or security will transfer?
How many shares?
Approximately when will it transfer?
How should the gift be designated?

Transfer securities to:

Merrill Lynch account #: 728-04030*
DTC: **8862**
Tax ID for Davidson College: 56-0529961

* This account does not accept all mutual funds. Please contact Merrill Lynch or Dawn Smith prior to transferring mutual funds.

Contacts at Merrill Lynch:

Pete Kaplan
Wealth Management Advisor
Pete_Kaplan@ml.com
150 North College Street, Suite 2800
Charlotte, NC 28255
704-339-2193

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Client Associate
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