

## 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**  
**Assistant Director of Gift Planning**  
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\*  
Account name: Davidson College  
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.

### **Contact at Merrill Lynch:**

**Kyle Pence**  
**Officer, Relationship Manager**  
*kyle.pence@ml.com*  
704-339-2116  
800-937-0867  
704-837-8607 (fax)

