

# GIFTS OF STOCKS AND SECURITIES

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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

**Kyle Pence**  
**Client Associate**  
*Kyle.Pence@ml.com*  
704-339-2116  
800-937-0867  
704-837-8607 (fax)

