



MCDOWELL
SONORAN
CONSERVANCY

30 YEAR ANNIVERSARY 1991-2021

Gifts of Stock

Giving appreciated securities is a great way to support the McDowell Sonoran Conservancy. By donating stock that has appreciated for more than a year, your gift can avoid capital gains tax while allowing you to claim a deduction equal to the fair market value of the gift at the time of transfer. The date of your gift will be the date the securities are received in the McDowell Sonoran Conservancy's brokerage account. The McDowell Sonoran Conservancy can sell the securities tax free and use the funds to achieve your wishes.

PLEASE NOTE

Securities transfers do not include the donor's name or address. To ensure that your gift is recorded and acknowledged correctly, you **MUST** provide the following information to the McDowell Sonoran Conservancy before transferring shares:

- Your name, address, and phone number
- Your broker's contact information
- Number and type of share to be transferred
- Approximate date of transfer
- Special instructions (preferred recognition/anonymity, gift purpose, etc.)

Please notify:

Adele Dietrich, CFRE, CAP®
Dir of Development & Marketing
adele@mcdowellsonoran.org
480.998.7971, 102

Justin Owen, CNAP
Chief Executive Officer
justin@mcdowellsonoran.org
480.998.7971, 103

INFORMATION TO SHARE WITH YOUR BROKER

Account Name:	McDowell Sonoran Conservancy
Fed Tax ID:	86-0674350
Account Number:	2005-3103
DTC Number:	0141
Broker:	Wells Fargo Clearing Services, LLC Wells Fargo Bank, N.A. 420 Montgomery St, San Francisco, CA 94104 800-872-3377

The McDowell Sonoran Conservancy recommends that you consult with your legal for financial advisors when considering what type of planned gift best suits your unique circumstances.

7729 East Greenway Road, Suite 100, Scottsdale, AZ 85260
480.998.7971 | mcdowellsonoran.org

Science is in our nature