



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:

Lisa Phillips

Controller

Lisa@mcdowellsonoran.org

480.998.7971

Kerry Quinn

Development Manager

Kerry@mcdowellsonoran.org

480.998.7971

INFORMATION TO SHARE WITH YOUR BROKER

Account Name: McDowell Sonoran Conservancy

Fed Tax ID: 86-0674350

Account Number: 20987668

DTC Number: 0164

Broker: Charles Schwab

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.