



DOWNEAST
COASTAL
CONSERVANCY



Giving Stock via DTC Delivery

1. **Brokers:** The donor's broker is requested to contact Downeast Coastal Conservancy (DCC) to provide stock transfer information so that contributions may be properly credited. This step is vital.

Prior to initiating a transfer of stock, please call the DCC office at (207) 255-4500 to advise a staff member of the following information (if the office is not staffed at the time of the call, please provide the information by sending an email message to Jon Southern, Executive Director (jon@downeastcoastalconservancy.org):

- Name and address of the donor (even if this is an anonymous gift DCC needs to know who to thank)
- Gift allocation: Downeast Coastal Conservancy
- Name of the stock to be transferred and its stock symbol
- Number of shares
- Approximate value of the shares
- Gift date being use for the broker's client (the donor)
- Approximate transfer date
- Name of clearing house (if used)

2. **Stock transfer via DTC:**

- DTC Participant and Number: Fidelity Investments DTC: 0226
- Credit to Fidelity Account: Downeast Coastal Conservancy
- Fidelity Account #: Z69468860

For further information or assistance, please contact the Jon Southern, Executive Director, (207) 255-4500 or jon@downeastcoastalconservancy.org.

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