



DTC DELIVERY INSTRUCTIONS FOR STOCK GIFTS

ENDOWED FUNDS

Davie Community Foundation, Inc. (DCF) welcomes gifts of stocks or other marketable securities from any brokerage firm. To initiate a stock transfer, please provide your broker with the following information.

Fidelity Investments through National Financial Services, Inc.

DTC # 0226

Fidelity Account # 638-319611

Davie Community Foundation, Inc.

Contact: Stan Hungerford, Woodard & Company Asset Management Group, 336-998-7000

To ensure prompt processing of your gift, please notify the Davie Community Foundation with the following information once transfer of securities has been requested. Call 336-753-6903 or email wsharpe@daviefoundation.org or dmatthews@daviefoundation.org.

Name of Donor

Name of Securities

Number of Shares Transferred

Name of Davie Community Foundation Fund to credit

Make sure to check with your stock advisor about the timing of your transfer. In order to complete a gift for tax purposes, your securities must be received into a DCF account. These times may vary based on the type of securities, the brokerage firm, and/or time of year.

Please call us at 336-753-6903 if you have any questions.

Wesley Sharpe, President

Dee Matthews, Finance Officer