



Securities Transfer Request Form

Step One: Shares can be transferred directly from your brokerage account to The Conservation Fund’s account. Complete the top section of this form and send a copy to your broker.

Date: _____

To: _____ (Your Broker’s Name and Brokerage Firm)

_____ (Your Broker’s Phone Number)

Please accept this letter as your authorization to irrevocably transfer:

Name of stock: _____ Number of shares: _____

Which you hold in the name of: _____
(Account title at brokerage firm, e.g. John Smith Family Fund)

From (your) account number: _____

Signature(s) of account owner(s): _____

Please see below for The Conservation Fund’s stock gifting DTC instructions:

DTC: 8862

Account Number: 5TL-03366

Account Name: The Conservation Fund

Contacts:

Madeleine Scanio

T: 301-215-4418

Madeleine.Scanio@ml.com

Jeremy Greenberg

T: 301-215-4414

Jeremy.Greenberg@ml.com

Step Two: We kindly ask that you also notify The Conservation Fund when making a stock transfer by contacting Hailey Foster via email at hfooster@conservationfund.org or phone at 703-908-5823.

Please share:

1) The name of stock and the number of shares being transferred:

2) For acknowledgement of the gift and tax receipt purposes, please list my/our name(s) as follows:

Preferred Name: _____

Preferred Address: _____

3) This gift is designated for: General support

Other (please specify program) _____