



PENNSYLVANIA  
LAND TRUST  
ASSOCIATION

## DONATION OF SECURITIES FORM

**Thank you for your gift of securities to PALTA!**

Please fill out the information below:

_____ Name & Type of Securities (ex: IBM common stock)	_____ Number of Shares	_____ Date of Transfer
_____ Donor's Name	_____ Broker's Name	
_____ Donor's Street Address	_____ Broker's Company	
_____ Donor's City/State/Zip	_____ Broker's Phone Number	

\_\_\_\_\_  
Donor's Phone Number (*Will only be used if question arises or a problem occurs in the donation process*)

PALTA's **broker contact information** is: Derek Shaffer, TD Ameritrade

T: 717-730-3311  
F: 717-730-3315  
Derek.Shaffer@tdameritrade.com  
114 N 2nd St,  
Harrisburg, PA 17101

For electronic transfers, our Depository Trust Company (**DTC**) number is: **0188**

This is the most secure and cost-effective way to process your gift.

PALTA's **tax identification number** (EIN) is: **23-2789029**

After PALTA receives this form and our broker confirms the donation of securities, the development director will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and date the stock was converted into a gift (day when record ownership of stock was transferred to PALTA or the stock was unconditionally delivered to PALTA).

Stock information can be mailed to PALTA, ATTN: Sara Painter, 119 Pine Street, First Floor, Harrisburg, PA 17101, emailed to [spainter@conserveland.org](mailto:spainter@conserveland.org) or called in to 717-230-8560.

All contributions are tax- deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Pennsylvania Land Trust Association is a 501(c)(3) nonprofit organization.

Contributions are tax-deductible as permitted by law.