



## Stock Donation Instructions

Thank you for your interest in making a charitable gift to Kids Helping Kids (KHK) in the form of a stock transfer.

If you currently hold stock in your brokerage account, your broker can assist you in making a gift of stock via a direct transfer to KHK. Giving a gift of highly appreciated publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock.

If you would like to make a donation of stock to KHK (tax ID# 27-1224284), please provide the following information to your broker:

- **Clearing Firm:** National Financial Services
- **DTC Number:** 0226
- **Account Name:** Kids Helping Kids
- **Account Number:** KE2-107562
- **Financial Advisor:** Dean L. Spada / Kingston Wealth Management Group
- **Telephone Number:** 860.432.9043
- **Reference:** Donor Name (Including your name will ensure the gift is properly acknowledged.)



## Stock Donation Form

Please complete the information below to notify Kids Helping Kids (KHK) of your gift and help ensure it is processed accurately. Please fax or email the completed information to Jennifer Kelley at 203.253.3400 or [info@kidshelpingkidsct.org](mailto:info@kidshelpingkidsct.org).

### Donor & Securities Information:

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Name & Type of Securities (e.g.: DELL common stock)    Security Symbol    Number of Shares    Transfer Date

\_\_\_\_\_  
Donor Name (Individual, Corporation, Foundation)

\_\_\_\_\_  
Donor Street Address

\_\_\_\_\_  
Donor City / State / Zip

\_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Broker Company / City / State

\_\_\_\_\_  
Broker Contact / Telephone Number

\_\_\_\_\_  
Donor Telephone / Email Address (to be used only if a question arises in the donation process)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Donor Signature    Date Signed    Donor Signature    Date Signed

**NOTE** - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree. Thank you again for considering KHK as the recipient of your charitable gift.