friends of karen

Supporting Critically Ill Children and Their Families

Stock Transfer Information

Thank you for your interest in making a charitable gift to Friends of Karen, Inc. in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to Friends of Karen. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide you with significant tax benefits. 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. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to Friends of Karen, Inc., please note the following:

Brokerage House: Charles Schwab & Company, Inc.
Account Name: Friends of Karen, Inc.
Tax Identification Number 14-1612290
DTC Number: 0164
Account #1106-9023
Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

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Please complete the information below to notify us of your gift and help ensure that it is processed accurately. Please fax or email the completed information to:

Friends of Karen, Inc., Attention: Stefanie Ortiz-Cidlik
Fax number (914) 277-4967 or
Email: stefanieortizcidlik@friendsofkaren.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) **Broker Name**

_____ _____
Donor Street Address **Broker Company / City / State**

_____ _____
Donor City / State / Zip **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 impact 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 Friends of Karen, Inc. as the recipient of your charitable gift. For additional information, please call Stefanie Ortiz-Cidlik, Executive Director (914) 617-4041.