



Gifts of Stock

Your Financial Advisor can assist you in making a gift of stock via a direct transfer to Kaleidoscope, Inc. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide greater 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. You may also save by not incurring brokerage fees because you are transferring ownership rather than selling the stock.

Provide the following information to your Financial Advisor:

Broker: Merrill Lynch

Account Name: Kaleidoscope INC

Account Number: 841-02732

DTC Number: 8862

Financial Advisor: Amanda Barclay

(p) 516 498-3308

(email) Amanda.Barclay@ML.com

Note: Kaleidoscope, Inc's policy is that stock is sold on the same day as received. However, Merrill Lynch must be notified that the stock transfer has occurred. For assistance, or if have any questions regarding donations of stock, please contact aespitia@kaleidoscope4kids.org or 773-292-4074.