

Stock Giving Instructions

Thank you for considering a stock grant to Simon's Heart. Donating appreciated stock is a very effective way to invest in our cause because of the added tax benefits available beyond the standard charitable deduction. Your accountant can advise you on these benefits. Your broker can electronically transfer the gift directly to our account at **Charles Schwab & Co., Inc.** as follows:

- **Simon's Fund (d/b/a Simon's Heart) – EIN 20-2771448**
- **DTC # 0164, Code 40 to Simon's Fund Account #3638-8232**
- **Charles Schwab & Co., Inc. / AS Document Control, 1945 Northwestern Drive, El Paso, TX 79912**
- Contact at Simon's Heart:
 - Jill Deeves – (267) 643-1400 - jill@simonsheart.org
- Contact at Sage Financial Group:
 - Mitchell Bednoff – (484) 342-4400 - mbednoff@sagefinancial.com

Please note, it is important that you (or your broker) alert Simon's Heart via phone (267-643-1400) or email (jill@simonsheart.org) that the gift is being transferred to our account, as the stock will arrive without identification.

Please include a mailing address so we can send a tax receipt.

Once your stock gift is processed, a tax receipt will be mailed out stating the name of the stock, the number of shares, and the date it was received by Simon's Heart. Your tax advisor should determine the value of the gift.

Simon's Heart was established in 2005 to prevent sudden cardiac arrest and death in children. Simon Sudman, a seemingly healthy three-month old boy, died in his sleep from an undetected heart condition. The organization provides free heart screenings for students, distributes AED devices to youth facilities, advocates for legislation to protect student athletes, promotes research through its digital registry, and educates families and coaches about the risks and warning signs of cardiac arrest.

SIMON'S Heart

PO Box 61 | Lafayette Hill, PA 19444 | www.simonsheart.org