



WAYS TO GIVE

Thank you for supporting Chicago Sinfonietta!

Ways to give include donating stock, making a charitable contribution via your Donor Advised Fund, or including CS in your Planned Giving.

STOCK DONATION

A charitable gift of stock provides an opportunity for tax savings while generously supporting Chicago Sinfonietta. Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings. However, you may also transfer certificates directly.

STOCK/SECURITIES DELIVERED ELECTRONICALLY

The following information will enable your broker to facilitate an electronic transfer of stock:

William Blair (through National Financial Services)

DTC: 0226

Account Name: Chicago Sinfonietta

EIN/ Tax ID: 36-3517987

Account Number: GER-004048

NOTIFICATION OF DONOR INTENT

To help us properly acknowledge your generous gift and ensure its credited correctly, please let us know the following details (either you or your broker can provide this information):

- Your name and full mailing address
- The name and number of shares transferred
- Your broker's name and full mailing address
- Email Amber Broderick at abroderick@chicagosinfonietta.org.



DONOR-ADVISED FUND (DAF) GIFT INFORMATION

Thank you for your generous donor-advised fund gift to Chicago Sinfonietta! Your contribution supports our mission to present world-class performances, engage our community through music, and inspire the next generation of young musicians.

Legal Name: Chicago Sinfonietta

Federal Tax ID (EIN): 36-3517987

Address: 70 E. Lake St, #1430, Chicago, IL 60601

PLANNED/LEGACY GIVING FORM

Your planned gift helps ensure a future where bold symphonic experiences and community engagement continue to thrive for generations to come. The following information allows us to honor your generosity and plan for Chicago Sinfonietta's future with confidence.

DONOR INFORMATION

Name(s): _____

Address: _____

City, State, ZIP: _____

Phone(s): _____

Email(s): _____

Preferred contact method: Email Phone Postal Mail

GIFT INFORMATION

I/we have made a provision for Chicago Sinfonietta through my/our:

- Will or Living Trust
- Retirement Plan Beneficiary Designation (IRA, 401(k), etc.)
- Life Insurance Policy
- Charitable Remainder Trust

Chicago Sinfonietta

Donor Advised Fund Remainder

Other (please specify): _____

Approximate current value (optional; used to calculate value if redeemed today):

\$_____

I/we prefer not to disclose the value at this time

RECOGNITION

We are deeply grateful to include you in the **Sinfonietta Legacy Society**, which recognizes those who have made provisions for the orchestra in their estate plans.

I/we are pleased to be listed as: (please list name(s) as you wish to appear):

I/we prefer to remain anonymous

ADVISOR INFORMATION (optional)

Estate/Financial Advisor: _____

Advisor Email/Phone: _____

SIGNATURES

This form is for informational purposes only and does not constitute a binding commitment.

Signature: _____

Date: _____

Signature (if joint): _____

Date: _____

RETURN INFORMATION

Please return this confidential form to:

Chicago Sinfonietta

Chicago Sinfonietta

Attn: Amber Broderick

70 E. Lake Street, Suite 1430

Chicago, IL 60601

Email: abroderick@chicagosinfonietta.org

Phone: (312) 284-1564

OPTIONAL COMMENTS

We would love to hear what inspired your planned gift to Chicago Sinfonietta:

GIFT ACKNOWLEDGMENT & QUESTIONS

So that we may accurately acknowledge your donation, you may provide a letter or send an e-mail to communicate this information at time of transfer to:

Chicago Sinfonietta

Attn: Amber Broderick

70 E. Lake Street, Suite 1430

Chicago, IL 60601

Fax: 312.236.5429

abroderick@chicagosinfonietta.org

QUESTIONS?

Contact Amber Broderick at abroderick@chicagosinfonietta.org or call 312-284-1564.