



## **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](mailto: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



☐ 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**

Attn: Amber Broderick

70 E. Lake Street, Suite 1430

Chicago, IL 60601

Email: [abroderick@chicagosinfonietta.org](mailto:abroderick@chicagosinfonietta.org)

Phone: (312) 284-1564

## OPTIONAL COMMENTS

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

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## 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](mailto:abroderick@chicagosinfonietta.org)

## QUESTIONS?

Contact Amber Broderick at [abroderick@chicagosinfonietta.org](mailto:abroderick@chicagosinfonietta.org) or call 312-284-1564.