


Making a Charitable Gift of Stock (Appreciated Securities)

Donors donate publicly traded securities as an attractive alternative to cash. Donating appreciated securities usually provides a tax deduction for the fair market value of the shares and avoids capital gains tax which occurs if shares are sold by the individual.

It is important that donors follow these instructions and notify Cleveland Play House of their intention to make a gift of stock to ensure that the transaction is received.

The donor provides instructions to their stock broker indicating the following information:

1. Instruct broker as to the effective date of the gift.
2. Identify the name of the stock issued and number of shares being donated.
3. Provide instructions to Cleveland Play House regarding their gift.
4. Contact Key Bank to transfer stock into Cleveland Play House's brokerage account.
5. Call or email Chel Miller (Contact information is below).

 Name of Receiving Institution:	Key Bank Securities
Broker Contact:	Heather L. O'Donnell
Broker Telephone No.:	216-689-3187
Broker Email:	heather_l_odonnell@keybank.com
Receiving Account No. :	2153756
DTC No. :	2205
Account Name:	Cleveland Play House Gift
Cleveland Play House's Tax ID:	34-6515260
CPH Contact:	Chel Miller rmiller@clevelandplayhouse.com 216-400-7037

To have a clear record of your gift, we request a copy of any letter of instruction which you provide to your broker/client be sent to Cleveland Play House. Please make sure the gift date is clearly identified. If no gift date is provided, the date the stock is received by Key Bank will be used.

Cleveland Play House will send an acknowledgement letter to the donor after the stock is sold. The stock is valued at the median market value using the gift date. Thank You!