

INSTRUCTIONS FOR STOCK DONATION TO CLEVELAND POPS ORCHESTRA

Stock Transfer Instructions

| | |
|--|--|
| Broker: | Charles Schwab & Co., Inc. |
| Address: | 511 Park Avenue Orange Village, OH 44122-4255 |
| Charles Schwab & Co., Inc. Federal ID#: | 94-1737782 |
| DTC#: | 0164 |
| Cleveland Pops Orchestra Account number: | 3675-1651 |
| Account Name: | CLEVELAND POPS ORCHESTRA |
| Schwab contact: | Lakeisha Pinkard lakeisha.pinkard@schwab.com 216-291-9306 |
| Reference: | <i>Donor name and fund</i> |
| Cleveland Pops Orchestra Federal ID#: | 34-0714588 |

Instruct your broker you would like to donate securities to the **Cleveland Pops Orchestra**, a non-profit organization. Ask for a “Gifting Request”, or similar form. Your Broker/Advisor should be able to help complete this form.

Please inform Loren Toplitz (lorentoplitz@clevelandpops.com) that your stock donation is coming so that we can honor the intention of the gift and thank you appropriately.

It is helpful (but not required) to know the brokerage company that is sending the stock and how many shares of what security are being transferred. This helps us to match the gift with the donor.

When you make a gift of stock, the Pops receives the current value of the stock the day of the donation and you will receive acknowledgement for this value as a charitable donation. Capital gains tax does not apply to appreciated stock donated to a nonprofit organization if the appreciated stock is donated as described above. The stock is priced according to IRS rules.