



The Board of Directors

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Mission

Providing life-enhancing, physical and psychological experiences and therapeutic services, to individuals with special needs and their families

DONATE STOCK TO LIFESTRIDERS AND SAVE

Donating Stocks to LifeStriders

If you are thinking of donating money to LifeStriders and if you own shares of publicly traded stock(s) whose value has grown (maybe doubled, tripled or more, over the last few years to an amount, for example say \$5,000) and you want to make a gift to LifeStriders this year, consider gifting the stock shares (in “kind”) to LifeStriders, instead of selling your stock shares and donating the remaining cash - after you paid taxes on the gain. For your tax (or AGI) purposes, if you do this, you should not have to report any income from the gain in value, or pay any income tax from the sale of your stock (because LifeStriders would sell the stock); yet you should have an itemizable tax deduction for the full contribution of the \$5,000 or whatever the average value of the gift is on the date of the transfer. Likewise, treatment of other valuable/appreciated property can work similarly, but with slightly varying tax treatments. For more information, consult with your financial advisor.

How Can I Donate Stock Shares to LifeStriders?

Most stock brokers will honor a reasonable request by phone, letter or (their) form to transfer shares of stock(s), “in kind”, as gifts to 501c3 charities, such as LifeStriders. Of Course, if you are in possession of the stock certificate, you may also deliver a stock certificate directly to Fidelity Investments FBO LifeStriders (or if necessary, securely deliver to Chrystal Stephens along with a “Stock Assignment” signed over to Fidelity Investments FBO LifeStriders).

If the stock is being transferred from a “Fidelity Investments” account you should be able to do this by calling Fidelity at 800-343-3548, simply verifying your identity and making the request by phone (since LifeStriders maintains a Fidelity Investments account to receive such gifts).

Another Option:

Include LIFESTRIDERS in Your Annual IRA “MRD” and Distribution Planning

If you have a Traditional or Rollover IRA and you are taking Minimum Required Distributions (MRD’s) you may contribute some of the distribution directly from your IRA to a Qualified 501c3 charity, such as LifeStriders. The contribution can count as a part of your MRD and for tax purposes the contributed portion of the

111 W29667 Summit Ave. Waukesha, WI 53188 Phone: (262) 565-6124

www.lifestriders.org

distribution amount should not be counted as income for income tax purposes. So again, you can donate to LifeStriders without paying any taxes on the IRA gain(s); and here you never paid any taxes on the principal you initially invested, either. Note: You cannot take an itemized tax deduction for this donation which, of course, you never paid taxes on to begin with.

How Can I Direct my IRA Distribution to LifeStriders?

Call your IRA Custodian for their specifics on how they can help expedite this. Fidelity Investments seems to be able to make reasonable distribution/transfers from Fidelity held IRAs, by verifying your identity, providing your information, and requesting the distribution by phone (800-343-3548).

If you are considering these ideas, CONSULT YOUR TAX ADVISOR for verification of the above information and its applicability to your specific situation. LifeStriders is not a tax or legal advisor, so do not act on this information without getting professional advice for your situation.

LIFESTRIDERS STOCK TRANSFER CHECKLIST

For a Direct Stock Transfer,
or to Direct an IRA Distribution
Please Have This Information Handy:

Your Personal Brokerage Account Number:

Your Stock Name:

Quantity and the Lot Being Transferred:

Recipient Broker:

Fidelity Investments: DTC # 0226

For Benefit of (FBO):

LifeStriders, 511 W29667 Summit Ave., Waukesha, WI 53188

(Phone: 262-565-6124)

Fidelity Investments Acct. # _____ - _____

(Please Call Chrystal @ 262.565.6124 to obtain the Account Number)