



KidSmiles

Gifted Instructions

Making a gift of a stock, mutual fund or bond is simple:

- 1.) Notify KidSmiles of your intention to make a gift of a security. To properly credit your gift, KidSmiles must be aware of the transfer details.
- 2.) Supply your advisor or broker with the following information:
 - a. Custodian: Charles Schwab
Account Registration: KidSmiles
Account Number: 2130-5011
DTC Number: 0164, Code 40
- 3.) Alert KidSmiles of your transfer or details of the gift (stock name, number of shares and approximate date of transfer).
- 4.) Feel free to contact our advisor shown below with any questions.
 - a. PDS Planning, Inc.
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