



## The Giving Season is here!

Your generosity – and all it inspires – creates lasting impact in our community. As you make decisions about year-end contribution to your Fund and grant distributions to your favorite public charities, please refer to the 2023 timetable below.

Please note: due to the scheduled holidays, the Community Foundation will be closed on December 25, 26, 30, and 31. Your financial institutions may have other unique closure times, so we encourage you to make a year-end contribution to your Fund as soon as possible to avoid delays. For details about how to make your contribution, including stock/security transfer instructions, please contact us at [stewardship@cflouisville.org](mailto:stewardship@cflouisville.org) or 502.585.4649.

<b>ACTION NEEDED</b>		
<b>CONTRIBUTIONS TO YOUR FUND</b>	<i>A contribution is a donation made to a Fund. This can be tax-deductible to the donor at the time we receive the gift, subject to IRS regulations.</i>	<b>DEADLINE TO RECEIVE</b>
Check	_____ 's office	December 29
	<b>Noon on Friday, December 29</b> <u>Mailed</u> : Postmarked by <u>USPS</u> on or before <b>December 30</b> .	December 30
Wire transfer	Give wire instructions to your financial institution <b>by mid-December</b> to ensure your contribution is received by the December 29 deadline.	December 29
Credit card	Make an online credit card gift by selecting "Add to my Fund via Credit Card" from the menu options after logging in to our online platform.	December 31
Publicly Traded Securities	Stock gifts usually take a few business days to transfer but can be delayed further given the volume of transactions and holidays at year's end. We recommend instructing your broker to initiate a stock transfer <b>by mid-December</b> to ensure it is received by the December 29 deadline. Please contact us at <a href="mailto:stewardship@cflouisville.org">stewardship@cflouisville.org</a> or 502.585.4649 to inform us of your stock gift.	December 29
Mutual funds	<b>As soon as possible</b> , contact your mutual fund administrator or broker because it may take a month or more for this transfer process to be completed. Please contact us at <a href="mailto:stewardship@cflouisville.org">stewardship@cflouisville.org</a> or 502.585.4649 to inform us of your mutual fund gift.	December 29
Complex such as stock certificates, real estate, and shares of a privately held company	<b>As soon as possible</b> , contact Director of Gift Planning, Jennifer Fust-Rutherford, JD, at 502.855.6953 or <a href="mailto:jenniferfr@cflouisville.org">jenniferfr@cflouisville.org</a> to discuss your _____, as it can take a month or more for this gift to be completed.	December 29
<b>GRANT FROM YOUR FUND</b>	<b>ACTION NEEDED</b>	<b>RECOMMENDED DEADLINE</b>
Year-end grant distribution to a public charity	<i>A grant distribution is money sent out of a Fund to a nonprofit organization. This is not tax-deductible.</i> Due to the volume of grant _____ processed during December, we recommend submitting grant requests by December 8* to ensure they are processed before year-end.	December 8*

\*For grant \_\_\_\_\_ submitted after December 8, we will give our best effort to process within our normal \_\_\_\_\_ 5 business day timeline and will notify you if there will be a delay.

For questions about your Fund, please contact Miranda Reece, Manager of Gifts & Donor Services, at 502.855.6958 or [stewardship@cflouisville.org](mailto:stewardship@cflouisville.org).