

Happy Giving Season!

As you make decisions about year-end contributions to your fund and grant distributions to your favorite nonprofit organizations, please refer to the 2024 timetable below.

Generally, all 2024 contributions to your fund must be received by December 31. See below for our suggested deadline for initiation of each type of contribution. *The Community Foundation will be closed on December 24 and 25.*

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, please contact us at stewardship@cflouisville.org or 502.585.4649.

Action Needed

Contributions to Your Fund	<i>A contribution is money added to a fund. This donation to the Foundation can be tax-deductible to the donor upon receipt, subject to IRS regulations.</i>	Deadline to Initiate
Check	<p><u>Hand-delivered:</u> Bring to the Community Foundation’s office by 5:00 p.m. on Tuesday, December 31.</p> <p><u>Mailed:</u> Postmarked by USPS on or before Tuesday, December 31.</p>	December 31
Wire Transfer	Give wire instructions to your financial institution by December 16 to ensure your contribution is received by the December 31 deadline.	December 16
Credit Card	Make an online credit card gift by selecting “Contribute to my Fund via Credit Card” from the menu options after logging in to our online platform.	December 31

As of March 2024, gifts of publicly traded securities must be sent to the Community Foundation of Louisville’s account at PNC, as our brokerage account at Merrill Lynch is closed. Please view the stock and mutual fund transfer instructions resource on page 3.

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 by December 16 to ensure it is received by the December 31 deadline. Please contact us at stewardship@cflouisville.org or 502.585.4649 to inform us of your stock gift.

December 16

Mutual Funds	As soon as possible, 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 stewardship@cflouisville.org or 502.585.4649 to inform us of your mutual fund gift.	As Soon As Possible
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Complex Contributions

As soon as possible, contact our Director of Gift Planning, Emily Monarch, JD, at 502.855.6945 or EmilyM@cflouisville.org to discuss your complex contribution, such as stock certificates, real estate, and shares of a privately held company. It can take a month or more for this gift to be completed.

As Soon As Possible

Grant Distributions From Your Fund	Action Needed	Deadline
Year-end grant distribution to a nonprofit organization	Due to the volume of grant distributions processed during December, we recommend submitting grant requests by December 6* to ensure they are processed before year-end.	December 6*

**For grant distribution recommendations submitted after December 6, we will give our best effort to process them within our normal timeline (within 5 business days) and will notify you if there is a delay.*

For questions about your fund, please contact our Director of Gifts & Donor Services, Miranda Reece, at 502.855.6958 or stewardship@cflouisville.org.



Released March 25, 2024

The Community Foundation of Louisville has updated transfer instructions for gifts of stock and mutual fund shares.

Effective immediately, gifts of publicly traded securities – stocks and mutual funds – must be sent to the Community Foundation’s account at PNC.

PNC Bank

DTC #: 2616

Acct #: 21-75-080-8136453

Acct Name: CFL STOCK GIFT

Attn: Community Foundation of Louisville

Phone #: 502-855-6991 (Julia Jones, Community Foundation of Louisville)

The Foundation’s previous account at Merrill Lynch is closed and is no longer able to accept contributions of any type.

Notification Required

As a reminder, you or your Financial Advisor must notify the Community Foundation at stewardship@cflouisville.org or 502.585.4649 anytime you contribute stock or mutual fund shares. Your notification to us must include:

- The donor’s name
- The fund’s name
- The transferring security’s name and number of shares

Thank you for your partnership with the Community Foundation of Louisville. For assistance, please contact us at stewardship@cflouisville.org or 502.585.4649.