



Giving Season is here!

Guidelines for your year-end gifts and grant distributions

Your charitable giving creates lasting impact in our community. As you make decisions about year-end gifts to your fund and grant distributions to your favorite nonprofits, please refer to the 2019 timetable below. By following these guidelines, you can be confident that your gifts and grants will be processed before the end of the year.

GIFTS TO YOUR FUND	ACTION NEEDED	DEADLINE
Check or stock certificate	Mailed: Postmark on or before December 31. Do not mail signed stock certificates; mail a signed stock power form and unsigned stock certificates in separate envelopes.	December 31
	Hand-delivered: Bring to the Community Foundation by noon on Tuesday, December 31.	December 31
Wire transfer	Instruct your financial institution to wire your gifts to the Community Foundation on or before Friday, December 27.	December 27
Credit card	Make an online credit card gift to your fund by selecting "Add to Fund via credit card" from the menu options on your donor portal.	December 31
Stock held at a brokerage firm	Work with your broker for exact timing to complete a stock transfer. Please have your broker call the Community Foundation at 502.585.4649 prior to making the transfer.	December 18
Mutual funds	Contact your mutual fund company as soon as possible because it can take a month or more for this transfer process to be completed. Call the Community Foundation at 502.585.4649 to inform us of your intended gift.	November 15
Special securities, such as: private company or S-Corp stock, or LLC units.	Call the Community Foundation at 502.585.4649 by Monday, December 2 to discuss this type of gift.	December 2

GRANTS FROM YOUR FUND	ACTION NEEDED	DEADLINE
Year-end grant to a public charity	Submit grant requests by December 8	December 8

For grants submitted after December 8, we will give our best effort to process them within our normal 5-10 business day timeline and will notify you if there will be a delay.

To explore all of the ways you can turn your generosity into impact, contact Jennifer Fust-Rutherford, Director of Gift Planning, at 502.855.6953 or jenniferfr@cflouisville.org.

For questions about your fund, please contact Miranda Reece at 502.855.6958 or mirandar@cflouisville.org.