



The Giving Season is here!

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 2021 timetable below. By following these guidelines, you can be confident that your gifts and grants will be processed before the end of the year.

As of February 1, 2021, gifts of publicly traded securities (stocks and mutual funds) must be sent to the Community Foundation's account at Merrill Lynch. Please contact us at stewardship@cflouisville.org or 502.585.4649 to request our current Merrill Lynch account details to share with your broker. Please be sure to notify us of the stock gift details so that we can properly track the gift and credit the proceeds to you and your fund.

GIFTS TO YOUR FUND	ACTION NEEDED	DEADLINE TO RECEIVE
Check or stock certificate	<p><u>Mailed:</u> Postmark by USPS on or before December 31. Do not mail signed stock certificates; mail a signed stock power form and unsigned stock certificates in separate envelopes.</p> <p><u>Hand-delivered:</u> Bring to the Community Foundation by Noon on Friday, December 31.</p>	December 31
Wire transfer	Instruct your financial institution to wire your gifts to the Community Foundation on or before Monday, December 27 .	December 31
Credit card	Make an online credit card gift to your fund by selecting "Add to my Fund via Credit Card" from the menu options in the donor platform.	December 31
Publicly Traded Securities	While stock gifts can be accepted until December 31, they usually take a few business days to transfer and can be delayed further given the volume and holidays at year's end. Work with your broker by mid-December for exact timing to complete a stock transfer <u>to our Merrill Lynch account</u> . Please have your broker contact us with the details of the stock(s) being transferred at stewardship@cflouisville.org or 502.585.4649 prior to making the transfer.	December 31
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. Contact the Community Foundation at stewardship@cflouisville.org or 502.585.4649 to inform us of your intended gift.	ASAP/ December 31
Complex gifts such as real estate and shares of a privately held company	As soon as possible , contact Jennifer Fust-Rutherford, Director of Gift Planning, at 502.855.6953 or jenniferfr@cflouisville.org to discuss this type of gift, as it can take a month or more for this gift to be completed.	ASAP/ December 31
GRANTS FROM YOUR FUND	ACTION NEEDED	DEADLINE
Year-end grant to a public charity	Submit grant requests by December 5.	December 5

For grants submitted after December 5, 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.