



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 public charities, please refer to the 2022 timetable below.

Please note: due to holidays occurring over the weekend, the Community Foundation will be closed on December 23, 26, and 31. Your financial institutions may have other unique closure times, so we encourage you to make a year-end gift to your fund as soon as possible to avoid delays. For details about how to make your gift, including stock/security transfer instructions, please contact us at stewardship@cflouisville.org or 502.585.4649.

GIFTS TO YOUR FUND	ACTION NEEDED	DEADLINE TO RECEIVE
Check	<p><u>Mailed</u>: Postmarked by USPS on or before December 31.</p> <p><u>Hand-delivered</u>: Bring to the Community Foundation by Noon on Friday, December 30.</p>	December 31
Wire transfer	Instruct your financial institution to wire your gifts to the Community Foundation on or before Tuesday, 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	Stock gifts usually take a few business days to transfer but can be delayed further given the volume of gifts and holidays at year's end. We recommend instructing your broker to initiate a stock transfer by mid-December to ensure your gift is received by the December 30 deadline. Please contact us at stewardship@cflouisville.org or 502.585.4649 to inform us of your stock gift.	December 30
Mutual funds	As soon as possible contact your mutual fund administrator or broker <u>and</u> us at stewardship@cflouisville.org or 502.585.4649 because it may take a month or more for this transfer process to be completed.	December 30
Complex gifts such as stock certificates, 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 your gift, as it can take a month or more for this gift to be completed.	December 30
GRANTS FROM YOUR FUND	ACTION NEEDED	RECOMMENDED DEADLINE
Year-end grant to a public charity	Due to the volume of grants processed during December, we recommend submitting grant requests by December 2* to ensure they are processed before year-end.	December 2*

*For grants submitted after December 2nd, we will give our best effort to process them 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 mirandar@cflouisville.org.