FREEWILL

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Year-end giving deadlines template

Year-end giving deadlines

Different gift types have different processing timelines, and gifts of stock, donor-advised fund grants, and IRA distributions generally require more lead time than credit card or check donations.

This template provides a single page where donors can find the applicable deadline for each type of gift.

Five things to do before you publish

1. Replace everything in brackets. Placeholders look like [ORGANIZATION NAME] and [EIN], so you can use find and replace to catch them all.
2. Set your own dates. The ones here are suggestions, but will vary depending on internal processes established by your organization.
3. Feel free to delete anything that does not apply. If you cannot accept a gift type, remove that whole section rather than leaving it blank.
4. Delete the grey italic lines. Each one tells you what to do with an optional link. Replace it with real text if you have a page to point to, or delete the line.
5. Delete the first two pages, including this one, before you share it with donors.

A note on tax language

This template is written to be educational rather than advisory, and it points donors to their own advisors. Keep that framing. Deadlines and tax treatment vary by institution and by individual circumstance, and neither your organization nor your staff should be in the position of giving tax advice.

[ORGANIZATION NAME]

[Add your logo above or here, then delete this line]

Year-end giving deadlines

To make your gift count for [YEAR], here is when to start. These are the dates we recommend, set early enough that your gift has time to clear. Your own advisor, broker, or account custodian may have different cutoffs, so please check with them as well.

START BY

[TUESDAY, DECEMBER 15]

Gifts of stock or other securities

Electronic transfers take several business days, and the gift is dated when the shares land in our account rather than when you request the transfer. Starting in mid-December leaves room if anything needs a second try.

WHAT YOUR BROKER WILL NEED

DTC number **[DTC NUMBER]** · Account **[ACCOUNT NUMBER]** · **[BROKERAGE NAME]**

Transfers arrive without donor names attached, so please tell us at **[EMAIL]** when you initiate, and we will watch for it.

Optional: if you have an online stock giving page, replace this line with something like "Give online at [LINK]". If you do not, delete this line.

RECOMMEND BY

[TUESDAY, DECEMBER 15]

Grants from a donor-advised fund

Your sponsor processes the grant and then mails or transfers the funds, which takes time at the busiest point of their year. Recommend early so the grant reaches us this year.

WHAT YOUR SPONSOR WILL ASK FOR

Legal name **[LEGAL NAME]** · EIN **[EIN]**

Mailing address **[ADDRESS]**

Searching by EIN avoids any mix-up with similarly named organizations.

Optional: if you have a DAF giving widget or page, replace this line with something like "Recommend your grant at [LINK]". If you do not, delete this line.

START BY

[TUESDAY, DECEMBER 15]

Gifts from an IRA, if you are 70½ or older

Most custodians mail a paper check, and their internal cutoffs come earlier than people expect. This is the deadline we recommend starting the earliest. If you are 73 or older, a gift made this way can also satisfy your required minimum distribution.

WHAT YOUR IRA CUSTODIAN WILL NEED

Ask them to send a qualified charitable distribution to **[LEGAL NAME]**, EIN **[EIN]**, at **[ADDRESS]**. Please tell us at **[EMAIL]** when you initiate. These checks arrive from the custodian rather than from you, and a heads up lets us thank you properly.

Optional: if you have an online IRA giving page, replace this line with something like "Start your gift at [LINK]". If you do not, delete this line.

POSTMARKED BY

[THURSDAY, DECEMBER 31]

Checks by mail

A check postmarked December 31 counts for this year even if it reaches us in January.

MAIL TO

[MAILING ADDRESS]

BY 11:59 PM

[THURSDAY, DECEMBER 31]

Credit card and online gifts

This is the latest you can give and still have it count for this year.

GIVE ONLINE

[DONATION PAGE LINK]

NO DEADLINE

Worth a conversation any time

Gifts in your will, or from a retirement account or life insurance beneficiary

Naming us as a beneficiary of a retirement account or life insurance policy takes one form from your provider and no attorney. Those forms decide where the account goes regardless of what a will says, so they are worth a look even if your plans are already in place.

WHO TO TALK TO

[NAME] · **[DIRECT LINE]** · **[EMAIL]**

If you have already included us, please let us know so we can thank you.

Optional: if you have a legacy giving page, replace this line with something like "Learn more at [LINK]". If you do not, delete this line.

Our office is closed [DATE]

Anything that needs a person will be handled when we return. If you have questions, please reach out before [WEDNESDAY, DECEMBER 23], and we will make sure your gift is taken care of.

This page is educational and is not legal or tax advice. Deadlines vary by broker, donor-advised fund sponsor, and IRA custodian. Please confirm timing and tax treatment with your own advisors.