

## 2016 Year-end Procedures

# Grants & Contributions



The Community Foundation for Greater Atlanta wants you to experience the joy of giving. To make your year-end charitable planning a smooth and delightful process, secured charitable deductions must be received **no later than December 31, 2016**. Please note that **December 31 falls on a Saturday this year**.

Below are some helpful guidelines to ensure the timely processing of gifts and grants in 2016:

Type of Contribution	Estimated Process Time	Guideline	Deadline
Mutual Funds	3 - 4 weeks	Contact your mutual fund company as soon as possible. Call Wanda Wallace at 404.588.3192 and inform her of your intended gift.	Thursday, December 8
IRA Charitable Rollover	3 - 4 weeks	Contact your IRA administrator and philanthropic advisor. NOTE: May not be made into a donor-advised fund.	Thursday, December 8
Stock held at brokerage firm	3 - 5 business days	<p>Please check with your broker for exact timing to complete a stock transfer. To ensure their completion before year-end, electronic transfers to the Community Foundation should be completed by December 23, 2016. Have the broker call Wanda Wallace at 404.588.3192 prior to making the transfer.</p> <p>DTC Instructions – Merrill Lynch DTC #5198 RE: For further credit to The Community Foundation for Greater Atlanta, Inc. Account # 706-04J05 benefiting “The _____ Fund”.</p> <p>Please provide us with the name of stocks, approximate value of shares, anticipated date of transfer and broker’s contact information.</p>	Friday, December 23
Check or Stock Certificate	3 - 5 business days	<p>Mailed: Postmark on or before December 31, 2016. Do not mail signed stock certificates; mail a signed stock power form and unsigned stock certificates in separate envelopes.</p> <p>Attn: Wanda Wallace Community Foundation for Greater Atlanta 191 Peachtree Street, N.E., Suite 1000, 10th Floor Atlanta, GA 30303</p> <p>Hand-delivered: Bring to the Foundation by Saturday, December 31, 2016.</p>	Saturday, December 31

## 2016 Year-end Procedures: Grants & Contributions *(continued)*



Type of Contribution	Estimated Process Time	Guideline	Deadline
<b>Cash Wire Transfer</b>	3 - 5 business days	<ul style="list-style-type: none"> <li>Instruct your financial institution to wire your contribution on or before December 30.</li> <li>The Foundation must inform SunTrust of pending transfers. Please notify Wanda Wallace, <a href="mailto:wwallace@cfgreateratlanta.org">wwallace@cfgreateratlanta.org</a> or 404.588.3192 when making a transfer.</li> </ul> <p>Bank: SunTrust Bank, Atlanta, GA 30302                      ABA Routing Number: 061000104                      Account: The Community Foundation for Greater Atlanta, Inc.                      Account Number: 8800344106</p>	Friday, December 30
<b>Privately-held Assets</b> <i>Examples: closely-held stock, partnership, LLC interests</i>	3 - 5 business days	Contact: Christy Eckoff at <a href="mailto:ceckoff@cfgreateratlanta.org">ceckoff@cfgreateratlanta.org</a> or 404.588.3183 to discuss this type of gift.	Saturday, December 31
<b>Real Estate</b>	3 - 5 business days	Contact: Christy Eckoff at <a href="mailto:ceckoff@cfgreateratlanta.org">ceckoff@cfgreateratlanta.org</a> or 404.588.3183 to discuss this type of gift.	Saturday, December 31
<b>Estate Gift</b> <i>Examples: bequest, IRA, retirement plan beneficiary designations, life insurance</i>		Contact: Christy Eckoff at <a href="mailto:ceckoff@cfgreateratlanta.org">ceckoff@cfgreateratlanta.org</a> or 404.588.3183 to discuss this type of gift.	Saturday, December 31

Grant Request	Guideline	Deadline
<b>Year-end Grants</b>	<p>To ensure your grants are received by the specified nonprofit(s) by December 31, 2016, please submit your requests no later than December 6, 2016.</p> <p>You may request a grant from your donor-advised fund in any of the following ways:</p> <ul style="list-style-type: none"> <li>Your Donor Central account at <a href="http://cfgreateratlanta.org">cfgreateratlanta.org</a></li> <li>Mail a signed grant recommendation form to your philanthropic advisor</li> <li>Email your philanthropic advisor: Erin Boorn, Audrey Jacobs, Barrett Krise, Staci Lynch or Kathleen Wagner</li> <li>Fax a signed grant recommendation form to 404.577.8771</li> </ul>	Tuesday, December 6