

2017 Grants & Contributions



The Community Foundation for Greater Atlanta (CFGA) 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, 2017**. Please note that **December 31 falls on a Sunday this year**.

Below are some helpful guidelines to ensure the accurate and timely processing of gifts and grants in 2017. In addition, for gifts, please inform us of which fund is receiving the gift and include all necessary details so we can identify your specific contribution.

Type of Contribution	Estimated Process Time	Guideline	Deadline
Mutual Funds	3 - 4 weeks	Contact your mutual fund company as soon as possible. Call your philanthropic officer and inform them of your intended gift.	Thursday, December 7
IRA Charitable Rollover	3 - 4 weeks	Contact your IRA administrator and philanthropic officer.	Thursday, December 7
Stock held at brokerage firm	3 - 5 business days	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 22, 2017. Have the broker call Chris de Lastic at 678.244.9256 prior to making the transfer. DTC Instructions – Merrill Lynch DTC #8862 RE: For further credit to The Community Foundation for Greater Atlanta, Inc. Account # 706-04J05 benefiting “The _____ Fund” Important: Please provide us with the name of stocks, quantity, approximate value of shares, anticipated date of transfer and broker’s contact info.	Friday, December 22
Check or Stock Certificate	1 - 2 business days	Mailed: Postmark on or before December 31, 2017. Do not mail signed stock certificates; mail a signed stock power form and unsigned stock certificates in separate envelopes. Hand-delivered: Bring to the Foundation by Friday, December 29, 2017. Attn: Diana Davis Community Foundation for Greater Atlanta 191 Peachtree Street NE, Suite 1000, (10th Floor) Atlanta, GA 30303 Important: Please inform us which fund is receiving the gift.	Sunday, December 31

2017 Year-end Procedures: Grants & Contributions *(continued)*



Type of Contribution	Estimated Process Time	Guideline	Deadline
Cash Wire Transfer	1-2 business days	<ul style="list-style-type: none"> Instruct your financial institution to wire your contribution on or before December 29. Please identify name of donor or fund. <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 29
Privately-held Assets <i>Examples: closely-held stock, partnership, LLC interests</i>	1 - 2 business days	Contact: Christy Eckoff at ceckoff@cfgreateratlanta.org or 404.588.3183 to discuss this type of gift.	Friday, December 29
Real Estate	3 - 5 business days	Contact: Christy Eckoff at ceckoff@cfgreateratlanta.org or 404.588.3183 to discuss this type of gift.	Friday, December 29
Estate Gift <i>Examples: bequest, IRA, retirement plan beneficiary designations, life insurance</i>	1 - 2 business days	Contact: Christy Eckoff at ceckoff@cfgreateratlanta.org or 404.588.3183 to discuss this type of gift.	Friday, December 29

Grant Request	Guideline	Deadline
Year-end Grants	<p>To ensure your grants are received by the specified nonprofit(s) by December 31, 2017, please submit your requests no later than December 5, 2017.</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"> Your Donor Central account at cfgreateratlanta.org Mail a signed grant recommendation form to your philanthropic officer Email your philanthropic officer: Erin Boorn, Barrett Krise, Staci Lynch or Kathleen Wagner 	Tuesday, December 5