

THE CATHOLIC FOUNDATION

DEADLINES

2017 YEAR END REMINDERS (please note deadlines)

December 1

IRA Gift – if you are over 70 ½ the IRA Charitable Rollover provision has been made permanent. To make arrangements for this type of gift please contact Cheryl Mansour, Michael George or Mike Murray.

December 8

Marketable securities must be received in our Merrill Lynch account. Please check with your brokerage firm to ensure transfer to the Foundation is initiated before the deadline. Please alert us as to the type and shares of stock you will be gifting.

Physical **stock certificates** require several steps and must be hand delivered to the Foundation. Please call Carol McDonald in our office at 972-661-9792 for instructions.

Grant recommendations may be submitted through your DonorLink account or via email to mgalvin@catholicfoundation.com for checks to be dated prior to December 31, 2017.

December 28

Credit card contributions need to be made online at www.catholicfoundation.com/donate or by contacting The Catholic Foundation at 972-661-9792 by **12:00 p.m. CST**. Credit card contributions are only deductible in the year the charge is made.

December 29

Deadline for receipt of **wire transfers**.

Checks may be hand delivered before **12:00 p.m. CST**. If mailed, in accordance with IRS regulations, the envelope must be postmarked by the post office by **midnight on December 31, 2017**.