

THE CATHOLIC FOUNDATION

DEADLINES

2019 YEAR END REMINDERS (please note deadlines)

December 2

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 Elizabeth Murray.

December 6

Marketable securities – we recommend that you contact your broker to ensure timely transfer. Brokers can be extremely busy with stock transfers in December. Only securities in our account by December 31, 2019 will be considered a 2019 contribution. Your broker may have a deadline for receipt of gift instructions so be sure to check with them. Please check with your broker to ensure transfer to the Foundation is initiated before the deadline. Our transfer instructions can be found on our website at www.catholicfoundation.com. Please email cmcdonald@catholicfoundation.com 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 972-661-9794 for instructions.

Grant recommendations may be submitted through your DonorLink account or via email to mgalvin@catholicfoundation.com for checks to be dated and mailed by December 31, 2019.

December 31

Credit card contributions need to be made online at www.catholicfoundation.com/donate or through your donor-link account by **12:00 p.m. CST**. **If you do not use donor-link or do not have access to our website you may call us at 972-661-9792 on or prior to December 27th**. Credit card contributions are only deductible in the year the charge is made.

December 31

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, 2019**.