

# 2023 year-end giving deadlines

Key dates for your charitable giving before midnight December 31

NOV  
15

## Supporting organizations

All requests for the creation of a new supporting organization must be made by this date.

NOV  
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## Real estate gifts

Any real estate gifts requiring a Phase I Environmental Site Assessment must be initiated with NCF by this date.

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## Proprietary mutual funds

All proprietary mutual fund transfers must be initiated by this date.

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## New separately managed accounts (SMAs)

Any new SMAs (NCF fund assets that are separately managed by an advisor) must be set up by this date. Initiate gifts with a transfer agent by this date.

DEC  
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## Grants to charities

Grant requests to approved charities must be submitted by this date if you would like a check mailed by the end of the year. Note: Grants do not have to be issued by year-end for tax purposes.

DEC  
15

## Publically traded securities or E-checks

All stock and mutual fund transfers should be initiated with the transferring broker by this date. E-checks also need to be initiated by this date as well. A physical check or a wire transfer should be considered instead of an E-check after December 15. (NCF must receive the gift by December 31 to count toward the 2023 tax year.)

## Important address update

On September 18, NCF's national office is moving to a new building. To ensure your physical checks arrive safely, please make note of our new address: 1150 Sanctuary Pkwy, Suite 350, Alpharetta, GA 30009.

## TD Ameritrade/Schwab merger

Charles Schwab acquired TD Ameritrade (TDA) and is transitioning all TDA accounts to Schwab accounts. Friday, September 1, 2023, is the last day that stock gifts can be sent to the NCF TDA account. Beginning Tuesday, September 5, 2023, former TDA customers should send gifts to the existing NCF Schwab account, per the instructions on our Letter of Intent form.

[Download year-end giving forms at ncfgiving.com/forms](https://ncfgiving.com/forms)

Contact our team with any questions at 866.580.4483

DEC  
15**Complex gifts**

To ensure your complex gift can be completed by December 31, your asset donation form and all accompanying required documents must be received by December 15. Due to the high volume of complex gifts at the end of the year, we encourage you to submit your documents as soon as possible. We can accept your gift as early as today with an effective date of December 31, 2023. Contact our team for forms or more details.

DEC  
29**Cash gifts**

Physical checks must be postmarked by USPS no later than December 29.\* Cash and wire transfers must be received in NCF's bank account by this date as well.

**Charitable gift annuities (CGAs)**

Applications for CGAs, along with physical checks, must be dated and postmarked by USPS no later than December 29,\* and you must have previously received a CGA illustration with the terms on which the CGA agreement will be based. Wire transfers must also be received in NCF's bank account by this date.

**\* Special note:** Because December 31, 2023, falls on a Sunday and post offices will be closed, we encourage you to be sure all of your gifts are postmarked by USPS no later than Friday, December 29, or December 30, 2023, if your post office is open on Saturday.

**Physical certificates**

If you hold physical certificates, please visit [ncfgiving.com/forms](https://ncfgiving.com/forms) for information on the most effective ways to gift these securities.

**Complex gifts**

To stay ahead of the rush, please make sure you discuss your gift with your relationship manager early. We can work on your gifts now with an effective date of December 31, 2023.

**IRAs**

Most IRA custodians transfer IRA rollover funds by check or electronic transfer directly to the charity you choose. However, some IRA custodians issue a check payable to the charity. If a check is issued payable to the charity, and you deliver the check to an agent of the charity or send it by U.S. Mail postmarked by December 31, the transaction will qualify under Sec. 408(d)(8)(A) as an IRA rollover.

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