

# 2021 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  
29

## Real estate gifts

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

DEC  
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## New separately managed accounts (SMAs)

Any new SMA accounts (NCF Fund assets that are separately managed by an advisor) must be set up 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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## 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  
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## Publicly 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. A physical check or a wire transfer should be considered instead of an E-check after December 15. (Note: NCF must receive the gift by December 31 to count towards 2021 tax year.)

## Complex gifts

Thankfully the volume of complex gifts with NCF remains high this year. To stay ahead of the rush, please make sure you discuss your gift with your relationship manager early. We can work on your gifts early with an effective date of December 31, 2021 to avoid taking time your time away from your family during the holiday season.

## 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.

[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, a completed Asset Donation Form (see link at the bottom of this page) and all accompanying required documents must be received by this date. Note: 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, 2021.

DEC  
31**Cash gifts**

Physical checks and cash must be postmarked by this date. Wire transfers must be received in NCF's bank account by this date.

**Charitable Gift Annuities (CGAs)**

Applications along with physical checks must be dated and postmarked by this date. Wire transfers must be received in NCF's bank account by this date.

**Complex gifts**

Complex gifts must be finalized by this date.

**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.

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

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