



## 2019 Year-end Giving Deadlines

With the season of giving upon us, it's time to start thinking about your year-end charitable giving plans. Here is some helpful information along with key deadlines for charitable gifts than can begin to make an immediate impact on our community.

The Dallas Foundation is here to assist you with your year-end giving, whether it's grantmaking through your Donor Advised Fund or establishing a new fund to support your philanthropic goals. The Dallas Foundation can accept many non-cash assets – real estate, mineral rights, shares of partnerships, and art work—as charitable gifts. If you plan to recommend a grant to a new agency, our team can help you research that organization as well.

Just remember to let us know your plans as early as possible so that we can provide the best possible service and ensure your gifts qualify for a charitable gift deduction in 2019. Please keep the important dates below in mind.

We also encourage donor advised fund holders to submit grant recommendations by noon Friday, December 20 to ensure they are processed before the end of this calendar year. Grant recommendations from donor advised funds should be made online through our secure donor portal.

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### **Complex Gifts**

For gifts such as business interests, real estate or restricted securities, please contact The Dallas Foundation by December 6, 2019 to ensure closure by the end of the year.

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### **Publicly Traded Securities**

We encourage you to initiate the transfer of stocks and mutual funds as early as possible to ensure transfer is initiated to The Dallas Foundation by December 21, 2019.

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### **IRA Rollovers and Qualified Charitable Distributions**

Please determine the exact timing needed to transfer assets from an IRA to The Dallas Foundation December 23, 2019.

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### **Wire Transfers**

Ensure wire transfers are initiated by December 30, 2019. Visit [dallasfoundation.org/wiretransfer](http://dallasfoundation.org/wiretransfer) for detailed instructions.

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### **Checks and Credit Cards**

Checks must be delivered to The Dallas Foundation by 5 p.m. CT on Tuesday, December 31, 2019 or postmarked by December 31st. Credits cards should be processed by The Dallas Foundation or at [dallasfoundation.org](http://dallasfoundation.org) no later than 5 p.m. on Tuesday, December 31, 2019.