

## 2020 Year-End Guidelines

### Adding to Your Fund

- **Need gift instructions?** Simply log in to SmartSimple, our new online portal, and choose “DAF Resources” under “Events & Resources”. You can also email [donorservices@tbf.org](mailto:donorservices@tbf.org) and request that current gift instructions be emailed to you.
- **Notifying us** of your gift prior to transfer ensures we will properly credit your fund when the gift is received. Please contact [fundadmin@tbf.org](mailto:fundadmin@tbf.org) or call (617) 338-2213 in advance of initiating a gift.
- **Mailed donations must be postmarked no later than Thursday, December 31, 2020** in order to receive a 2020 tax deduction. Please note that due to remote work protocols, there may be a delay in the receipt of mailed donations.
- **Credit-card transactions** must be processed online no later than Thursday, December 31, 2020 to receive a 2020 tax deduction.
- **Mutual fund transfers, security transfers or cash wires** must be in the Boston Foundation’s account no later than December 31, 2020 to receive a 2020 tax deduction. To ensure that transfers are completed by December 31, we recommend that mutual fund transfers be initiated by Friday, December 11, and that security transfers or cash wires be sent with a few days’ leeway in advance of calendar year end to clear all accounts.

### Non-Cash Assets

Boston Foundation staff members work closely with donors and their professional advisors to ensure that every contribution is handled for maximum tax and philanthropic benefits. We have experience working with donors contributing the following types of assets:

- Privately-owned securities
- Restricted stock
- LLC and LLP interests
- Real estate
- Transfers from other gift funds
- Termination/consolidation of private foundations

Please contact your Donor Services liaison or call (617) 338-2213 as soon as possible for help with non-cash gifts.

### Grant Making from Your Fund

Grant suggestions will be approved through the end of the year according to our usual weekly process, and every effort will be made to process them in a timely manner. **However, any grant suggestions received after December 11 may not be paid by the end of the calendar year, due to year-end volume and potential outstanding grantee issues. Also, please note that due to remote work protocols, all grants are being paid via electronic wire transfer (ACH). If your grantee is not signed up for ACH payments, processing time may be greater.**

Through SmartSimple you can access a list of previously supported organizations for easy and efficient renewals. If you have a problem logging into your account, please contact Donor Services at [donorservices@tbf.org](mailto:donorservices@tbf.org).