

2021 Year-End Guidelines

Adding to Your Fund

- **Need gift instructions?** Simply log in to our online [Donor Portal](#) and choose “DAF Resources” under “Events & Resources”. You can also access the gift instructions through the [TBF Website](#) or email donorservices@tbf.org and request gift instructions to 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 or call (617) 338-2213 in advance of initiating a gift.
- **Mailed donations** must be postmarked no later than **Friday, December 31, 2021** in order to receive a 2021 tax deduction. Please note the new PO Box address in the gift instructions; consideration should be given to mail service delays that may affect timing of delivery.
- **Credit-card transactions** must be processed online no later than **Friday, December 31, 2021** to receive a 2021 tax deduction.
- **Mutual fund transfers, security transfers or cash wires** must be in the Boston Foundation’s account no later than December 31, 2021 to receive a 2021 tax deduction. To ensure that transfers are completed by December 31, we recommend that **mutual fund transfers be initiated by Friday, December 10**, and that **security transfers or cash wires be sent by Friday, December 24** 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 10 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 our [Donor Portal](#) you can access a list of your 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.