

# 2023 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](mailto: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](mailto:FundAdmin@tbf.org) or call 617-338-2213 in advance of initiating a gift.

**All gifts to Donor Advised Funds** must be in the Boston Foundation’s bank account no later than **Friday, December 29** to receive a 2023 tax deduction.

*To ensure that transfers are completed by this deadline, we recommend:*

**Mutual fund transfers** be initiated by **Friday, December 8**

**Security transfers** be sent by **Tuesday, December 26**

**Cash wires** be received by **Friday, December 29**

**Mailed donations** must be postmarked no later than **Saturday, December 30**

**Credit card transactions** must be processed online by **Sunday, December 31**

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

## 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 8 may not be paid by the end of the calendar year, due to year-end volume and potential outstanding grantee issues.** Please note, organizations that are not already signed up for electronic funds transfer (EFT) payments will be contacted by our Fund Administration team. If your grantee is unable to enroll to receive grants via EFT, processing may take longer.

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](mailto:DonorServices@tbf.org).

**Questions?** We invite you to email [DonorServices@tbf.org](mailto:DonorServices@tbf.org) or call (617) 338-2213. Thank you!