

## 2022 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 **December 30, 2022** to receive a 2022 tax deduction.
  - **Credit-card transactions** must be processed online and **mailed donations** must be postmarked no later than **Saturday, December 31**

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

- **Mutual fund transfers** be initiated by **Friday, December 9**
- **Security transfers** be sent by **Tuesday, December 27**
- **Cash Wires** be processed by **Friday, December 30**

### 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
- Cryptocurrencies
- Real estate
- Transfers from other gift funds
- Termination/consolidation of private foundations

Please contact your Donor Services liaison or call (617) 338-2213 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 9 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](mailto:DonorServices@tbf.org).