

# 2024 Year-End Guidelines

## Adding to Your Fund

**Need gift instructions?** You can [access them online](#) or email [DonorServices@tbf.org](mailto:DonorServices@tbf.org) and request they be emailed to you. Instructions are also saved in the [Donor Portal](#): Click on “Events & Resources” and select “DAF Resources.”

Kindly notify [FundAdmin@tbf.org](mailto:FundAdmin@tbf.org) or call 617-338-2213 in advance of initiating a gift to ensure it is credited properly.

**All gifts to TBF Funds must be in the Boston Foundation's bank account no later than Tuesday, December 31 to be eligible for a 2024 tax deduction.**

*To ensure that transfers are completed by 12/31, we recommend the following deadlines:*

**Mutual fund transfers** be initiated by **Monday, December 9**

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

**Cash wires and ACH transfers** be received by **Tuesday, December 31**

**Mailed donations** must be postmarked no later than **Tuesday, December 31**

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

## Non-Cash Assets

The Boston Foundation has experience working with donors who wish to contribute 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

Our staff works closely with donors and their professional advisors to ensure that every contribution is handled for maximum tax and philanthropic benefits. Please reach out with questions.

## Grant Making from Your Fund

This is a busy time of year! To ensure the organization(s) you wish to support receives your grant(s) prior to December 31, please submit recommendations **by Monday, December 9, 2024**.

We will continue to process grant recommendations through the end of the calendar year; however, additional due diligence may be required if the grant recommendation is to a nonprofit not previously reviewed and verified by the Boston Foundation, meaning processing may take longer.

Our Donor Portal is the most efficient way to submit grant recommendations – you can access a list of your previously supported organizations for easy and efficient renewals. Contact Donor Services if you encounter any issues.

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