



2023 Year-End Giving CHECKLIST

Dates to Remember:

November 30: Real Estate Gifts

Any real estate gifts requiring a Phase 1 Environmental Site Assessment must be initiated by the church by November 29th.

December 8: Proprietary Mutual Funds

All proprietary mutual fund transfers must be initiated by December 9th by the qualified financial institution.

December 15: Grants to the Church

Grants do not have to be made in 2023 for tax purposes, but if your giver would like a grant sent by the end of the year, grant requests must be submitted by December 16th by the qualified financial institution.

December 15: Stocks, Mutual Funds

All stocks and mutual fund transfers should be initiated with the transferring broker by December 16.

December 15: Complex gifts

(business interests, real estate, life insurance, etc.) To ensure a complex gift can be completed by December 31, a completed complex gift donation form and all accompanying required documents must be received by December 16 by the qualified financial institution.

December 31: Cash gifts

Physical checks and cash must be postmarked by December 30. Wire transfers must also be received in the church's bank account by this date.

QUESTIONS?

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CrossCity
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