

## 2025 YEAR-END PROCEDURES: GRANTS & CONTRIBUTIONS

To make your year-end charitable planning a smooth and delightful process, charitable gifts must be received and processed **no later than December 31, 2025**. Please note that **December 31 falls on a Wednesday this year**.

Below are guidelines to ensure the accurate and timely processing of gifts and grants in 2025. For gifts, please inform us which fund is receiving the gift and include all necessary details so we can identify your specific contribution.

| Type of Contribution         | Estimated Process Time | Guideline  | Deadline              |
|------------------------------|------------------------|--|-----------------------|
| Mutual Funds                 | 3-4 weeks              | Contact your mutual fund company as soon as possible. Call your philanthropic advisor and inform them of your intended gift.   | Wednesday, December 3 |
| Stock held at brokerage firm | 3-5 business days      | <p>Please check with your broker for exact timing to complete a stock transfer. To ensure <i>their</i> completion before year-end, electronic transfers to the Community Foundation should be completed by December 19, 2025. Have the broker call Muhammed Drammeh at 404.588.3204 prior to making the transfer.</p> <p>DTC Instructions - Merrill Lynch DTC #8862<br/>RE: For further credit to The Community Foundation for Greater Atlanta, Inc., <b>Account #706-04J05</b> (note "J") benefiting "The _____ Fund"</p> <p>Important: Please provide us with the name of stocks, quantity, approximate value of shares, anticipated date of transfer and broker's contact info.</p> <p>Individually Managed Funds: Please alert us if you make a contribution. Due to large volumes, this allows us to timely and properly credit your gifts.</p> | Friday, December 19   |
| Cash Wire Transfer           | 1-2 business days      | <p>Instruct your financial institution to wire your contribution on or before Monday, December 29.</p> <p>Important: Please identify name of donor or fund. This allows us to timely and properly credit your gifts.</p> <p>Bank: Truist Bank, Atlanta, GA 30302<br/>ABA Routing Number: 061000104</p> <p>Account:<br/>The Community Foundation for Greater Atlanta, Inc.<br/>Account Number: 8800344106</p>   | Monday, December 29   |



## 2025 YEAR-END PROCEDURES: GRANTS & CONTRIBUTIONS *(continued)*

| Type of Contribution       | Estimated Process Time | Guideline  | Deadline            |
|----------------------------|------------------------|--|---------------------|
| Check or Stock Certificate | 1-2 business days      | <p>Mailed: Postmark by USPS on or before December 31, 2025. Do not mail signed stock certificates; mail a signed stock power form and unsigned stock certificates in separate envelopes.</p> <p><b>Attn: Muhammed Drammeh</b><br/>           Community Foundation for Greater Atlanta<br/>           191 Peachtree Street NE, Suite 1000 (10th Floor)<br/>           Atlanta, GA 30303</p> <p><b>Important:</b><br/> <i>Please inform us which fund is receiving the gift.</i></p> | Friday, December 26 |

*\*Rollovers cannot be made to a donor-advised fund (DAF)*

| Grant Request   | Guideline  | Deadline           |
|-----------------|--|--------------------|
| Year-end Grants | <p>Please request your year-end grantmaking no later than December 1, 2025.</p> <p>You may request a grant from your donor-advised fund in any of the following ways:</p> <ul style="list-style-type: none"> <li>Your Fund Advisor Portal account at <a href="http://cfgreateratlanta.org">cfgreateratlanta.org</a></li> <li>Email our donor services team at <a href="mailto:sharedservices@cfgreateratlanta.org">sharedservices@cfgreateratlanta.org</a></li> <li>Email a member of our philanthropy team:<br/>           Tim Bresnahan, <a href="mailto:tbresnahan@cfgreateratlanta.org">tbresnahan@cfgreateratlanta.org</a><br/>           Daniel Lewis, <a href="mailto:dlewis@cfgreateratlanta.org">dlewis@cfgreateratlanta.org</a><br/>           Amanda Rubin, <a href="mailto:arubin@cfgreateratlanta.org">arubin@cfgreateratlanta.org</a><br/>           Caroline Stancil, <a href="mailto:cstancil@cfgreateratlanta.org">cstancil@cfgreateratlanta.org</a></li> </ul> | Monday, December 1 |