

# 2023 YEAR-END GIVING GUIDELINES

Refer to these critical dates to ensure that contributions are received and processed by **December 31**, the IRS deadline for yearly tax deduction eligibility.

TYPE OF CONTRIBUTION	ACTION NEEDED	DEADLINE
IRA	Notification must be made to administrator by <b>December 6, 2023</b> .	Envelope containing check must be postmarked by <b>December 31, 2023</b> .
PUBLICLY TRADED STOCK TRANSFERS AND MUTUAL FUNDS	Initiate a transfer request to the firm holding the securities by <b>December 6, 2023</b> .	Processing times may vary but typically take <b>one week or less</b> .
PHYSICAL STOCK CERTIFICATES		Envelope containing certificate must be postmarked by <b>December 31, 2023</b> .
DONOR-ADVISED FUNDS	Initiate a transfer request to the firm holding the funds by <b>December 6, 2023</b> .	Envelope containing check must be postmarked by <b>December 31, 2023</b> .
CRYPTOCURRENCY	Initiate gift of cryptocurrency by clicking on the following link for assistance from Orchard Alliance by <b>December 6, 2023</b> . <a href="https://orchardalliance.org/individuals-families/generosity">orchardalliance.org/individuals-families/generosity</a>	Cryptocurrency transaction must be completed by <b>December 6, 2023</b> .
ELECTRONIC CHECK		Electronic check via ACH must be must be initiated on or before <b>December 28, 2023</b> .
CHECK BY MAIL	Please make your check payable to "The Alliance" and mark the memo line "Christmas Offering."	Envelope containing check must be postmarked on or before <b>December 31, 2023</b> .
ONLINE CREDIT CARD DONATION		Credit card donations must be received by <b>December 31 at 11:59 p.m. (MST)</b> .

