

THE SAVVY ADVISOR'S GUIDE TO END-OF-YEAR GIVING 2020

brought to you by
**CENTRAL FLORIDA
FOUNDATION**
cffound.org

Get ahead of end-of-year giving.

2020 has been full of unknowns. Be in control of 2020 tax planning—ensure that your clients' contributions qualify for a charitable income tax deduction & start the conversation now. If your client plans to sell a business before the end of the year, be sure to contact us prior to completion of the sale to discuss giving options to minimize tax implications. Keep these dates in mind as you line up all your clients' end-of-year giving plans.

For assistance, contact Nicole at
ndonelson@cffound.org or 407.872.3050

Finalize
your end-of-year
plan together.



Set up a time to
talk to your clients.



Gifts of mutual funds
must be made. Find forms at
bit.ly/savvyadvisor.



Donor advised fund grant recommendations

must be made in MyFund.

[Timing of grants does not impact charitable income tax deductions.]



Gifts of publicly traded stocks must be made.

Real estate gifts must have titles transferred.

Partnership gifts must have the assignment completed.

Notify us early to ensure a smooth transfer of these gifts.

Checks sent via the U.S. Postal Service to our office must be **postmarked**.

Checks sent via FedEx must be **physically received at our office** by or before noon.

Credit card contributions must be completed by 11:59 pm.



For more details on implementing any of these giving vehicles, visit bit.ly/savvyadvisor.

Thank you for helping your clients make our community a priority.

HAPPY GIVING!

CENTRAL FLORIDA FOUNDATION

Central Florida Foundation can help you and your clients develop a strategy that yields true, meaningful impact.

Contact Nicole at ndonelson@cffound.org or 407.872.3050 for more information.