


# THE SAVVY ADVISOR'S GUIDE TO END-OF-YEAR GIVING 2022



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**CENTRAL FLORIDA  
FOUNDATION**  
[cffound.org](http://cffound.org)

## Get ahead of end-of-year giving.

Be in control of 2022 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](mailto:ndonelson@cffound.org) or 407.872.3050

BY

NOVEMBER  
18

### Aim to finalize end-of-year plan with clients.

With holidays quickly approaching, finishing up the conversation by mid-November allows everyone the relief of knowing their financial plan is in order.

BY

DECEMBER  
5

### Gifts of mutual funds must be made.

Find forms at  
[bit.ly/savvyadvisor2022](http://bit.ly/savvyadvisor2022)

BY

DECEMBER  
9

### Signature Fund grant recommendations must be made in MyFund.

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

### Stocks, Real Estate & Partnership Gifts

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.

ON OR BY

DECEMBER  
12

BY

DECEMBER  
30

### Everything Else

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..

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

For more details on implementing  
any of these giving vehicles,  
visit our [Pressional Advisor](#) page.

## 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](mailto:ndonelson@cffound.org)  
or 407.872.3050 for more information