

2021 Timetable for Tax Deductible Year-End Contributions

The following timetable may be helpful for year-end contributions to a fund **in time for the 2021 tax year.**



Gift Type	Important Dates	Instructions
Online via Credit Card	You can make gifts of up to \$10,000 each to your fund through Dec. 31, 2021 . You will receive an automatic electronic IRS gift receipt via email.	Visit philafound.org and select "Give Now" from the home page. Choose the name of your fund from the menu.
Check	Must be postmarked on or before Dec. 31, 2021 to receive an income tax deduction this calendar year. Make check payable to Philadelphia Foundation and put the name of the fund on the check memo line.	Mail to: Philadelphia Foundation P.O. Box 826728 Philadelphia, PA 19182-6728
Wire Transfer (Cash)	Must be received in Philadelphia Foundation's cash account by Dec. 31, 2021 . It is recommended that you initiate a wire transfer through your bank prior to Dec. 31, 2021 .	Wire Transfer Instructions are located at: www.philafound.org/wires .
Publicly Traded Stock held by your broker	Must be received by Philadelphia Foundation's brokerage account by Dec. 31, 2021 . It is recommended that you initiate a stock transfer through your broker prior to Dec. 10, 2021 . <i>Actual timing may be subject to your broker's actions.</i>	Stock Transfer Instructions are located at: www.philafound.org/stocktransfer . A delay in submitting the completed form could result in a loss in the value of your stock gift.
Mutual Funds	Must be received by Philadelphia Foundation's brokerage account by Dec. 31, 2021 . It is recommended that you initiate a mutual fund transfer through your broker prior to Dec. 1, 2021 . <i>Actual timing may be subject to your mutual fund company's actions.</i>	Contact Carol Kwietnieski, 610-260-8640 or Carol.Kwietnieski@morganstanley.com to obtain Mutual Fund Transfer Instructions <i>* Not all mutual funds are transferable.</i>

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“You may not be able to help the whole world,
but you can make a difference in your own community.”

- Elizabeth P. Carter



**To help ensure that your favorite charities
receive grants from your Donor Advised Fund by year-end,
please observe the following timeline and procedures.**

Grant(s) recommended by
November 19, 2021* will be
processed before the business
year-end (**December 31,
2021**).

*Best efforts will be made after
this date.

**Please note: Periodically,
delays occur during the due
diligence process. This may
impact the date of the grant
distribution.**

Grant recommendation forms are available through your Donor Services
representative or by email donorrelations@philafound.org

You have two fast and easy options:

- 1) Fax a completed grant recommendation form to **215-563-6882**.
- 2) Recommend a grant by logging onto our website at www.philafound.org
 - Select the “MyDonorPortal” button.
 - Enter your MyDonorPortal User Name and password.
 - Select “Quick Grant Request”. You need only the name and city of the nonprofit for the other fields to populate.

**If you have forgotten your MyDonorPortal Information or would like to sign
up for a My Donor Portal Login, please contact
donorrelations@philafound.org.**

Please allow time to activate new login passwords.

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FOUNDATION**

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donorrelations@philafound.org