



2018 End of Year Giving Guide

The chart below is a guide to help you with the timing of your gifts to the Whitefish Community Foundation and your grants to nonprofit organizations. Please allow additional time for Whitefish Community Foundation to conduct due diligence and process more complex situations. We look forward to helping you. For general questions, please call (406)863-1781 or email linda@whitefishcommunityfoundation.org.

Grantmaking	Process	Tips	Estimated Time*	Deadline for Donors
Grant Recommendations	Submit online by our <u>Donor Portal</u> or return the grant <u>recommendation form</u> by mail or fax. You can also call or email a request.	Recommending grants online is the fastest way. Feel free to call us with any questions you have at (406)863-1781.	3 - 6 business days from the time the grant recommendation is received to the time the check is mailed.	Received by the Foundation office by December 26, 2018 for grants to be mailed out by December 28.
Contributions	Process	Tips	Estimated Time	Deadline for Donors
Checks	Send a check made payable to Whitefish Community Foundation and indicate the name of the project or fund on the memo of the check. Address below.	Check contributions do not require additional paperwork. To confirm the date your check arrives, you may want to consider requesting a confirmation receipt with your mail.	WCF processes the check based on the day it arrives, not the check date. Please allow 1 week to receive an acknowledgment.	Received at the WCF office by December 31, 2018.
Credit Card Contributions	Donate online at: .whitefishcommunityfoundation.org . Or, call us to donate by credit card over the phone at (406)863-1781.	Donating online is a fast, secure and convenient way to donate. Calling in a donation is very easy or stop by the office 9 am to 4 pm, M-F	Donations are received the same day the contribution online is made.	Call or stop by the office by December 30 or donate online through the WCF website donation portal by December 31, 2018
Wire Transfers	Email or call us at (406)863-1781 and we will send you the wiring instructions.	Please make sure to alert WCF of your wire transfer so that we can credit the appropriate fund in a timely manner.	Time depends on financial institution processing the transfer. Typically this is 3 days.	Received by Whitefish Community Foundation on or before December 31, 2018
Public Securities	Send gifting instructions to your financial advisor with the WCF phone number to call for account and transfer details. Call (406)863-1781. Also contact us to inform us of your gift.	Please make sure to alert WCF of your transfer so that we can credit the appropriate fund in a timely manner and complete any grant requests.	Timing depending on the broker processing the transfer.	Received at WCF by December 28, 2018
Deferred Payment Gift Annuity using stock gift	Send gifting instructions to your broker as stated above. Contact WCF to review information for DPGA agreement.	Stock donations take time to transfer and require more information but depending on the cost basis it could give you a good Montana Tax Credit	Allow five days for stock transfer and 1 to 2 weeks to generate DPGA agreement.	Stock donation must be received by WCF no later than December 31, 2018 DPGA paperwork can be set up at anytime
Deferred Payment Gift Annuity using cash	Set up a meeting time with WCF to review annuity information contract.	DPGA is an easy way to take advantage of the Montana Charitable Endowment Tax Credit.	Allow 1 to 2 weeks for WCF to generate DPGA agreement.	Cash donation must be received by the Community Foundation no later than December 31, 2018 and meeting to set-up DPGA must be done prior to December 31, 2018