

## Your Generous Year-End Giving



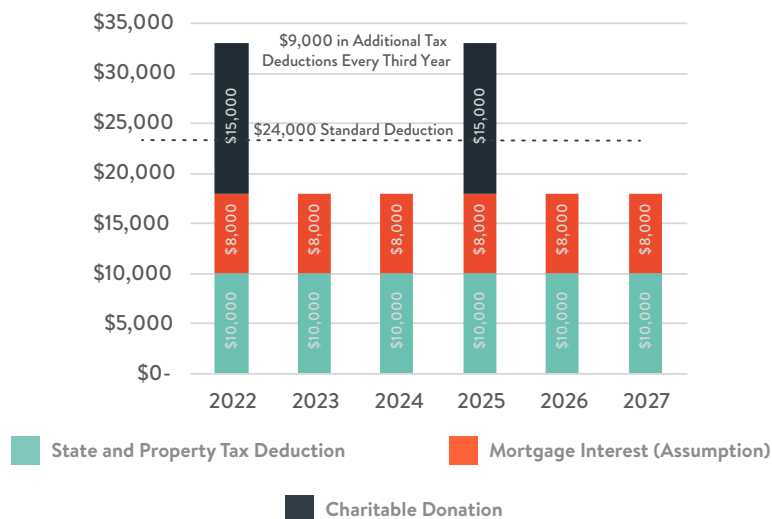
Greater Cincinnati Foundation (GCF) is thankful for your tremendous generosity that spans across the year. End-of-year tax considerations are important factors in leveraging year-end giving. We expect the end of 2022 to be another high season for donors supporting favorite causes through donor advised funds (DAFs) and encourage you to begin your support early.

**Gift Bunching:** Bunch several years' worth of charitable donations into one tax year with a gift to your DAF and advantageously accrue tax deductions that exceed your standard deduction. Then distribute these dollars to charitable organizations over multiple years. For more information, please contact your GCF philanthropic advisor.

### Qualified Charitable Distribution (QCD):

Are you age 70 ½ or older? Make a tax-free charitable gift of up to \$100,000 from your IRA assets directly to a qualified public charity, such as GCF. A QCD counts towards satisfying your IRA's required minimum distribution, and because that distribution is not recognized as income, it will not trigger federal income taxes - thus a great tax-savings approach. DAFs do not qualify for a QCD, but GCF offers other fund solutions to support nonprofits through donors' IRAs. For further information, please contact your GCF philanthropic advisor.

### DAF Bunching Strategy



\*GCF staff does not provide tax or legal advice. The information provided is for illustration purposes only.

As always, we suggest consulting with your tax advisor about your year-end giving.

# Important Dates

GCF staff will be working throughout the holiday season to facilitate your year-end charitable giving. Our office is open from 8:30 a.m. to 5 p.m. on weekdays, except for December 23 and December 26.

## CONTRIBUTING TO YOUR FUND

### Mutual Fund Shares

**Deadline  
11.18.2022**

Gifts of mutual funds provide the same tax benefits as stock gifts. Any gift of mutual fund shares should be initiated as early as possible, and no later than **November 18, 2022**.

\* This includes donations from EQ P&G, Shareowner Services Account.

### Publicly Traded Stock

**Deadline  
12.30.2022**

Appreciated stock is often a most advantageous gift. Written transfer instructions must be provided to your broker as soon as possible.

To count as a charitable income tax deduction in 2022, gifts of stock must be received into GCF's account **before 5 p.m., December 30, 2022**.

### Gifts by Check

**Deadline  
12.31.2022**

Checks received by mail must be postmarked by **December 31, 2022**, to qualify as a 2022 tax deduction. Hand-delivered checks must be received at our office **before 5 p.m., December 30, 2022**.

Greater Cincinnati Foundation  
720 E. Pete Rose Way, Suite 120  
Cincinnati, Ohio 45202

## Privately Held Stock

Equally advantageous to gifts of publicly traded stock is to donate stock in a privately held company, partnership interests, real estate or other non-cash assets. Please call Michele Carey to discuss at 513-768-6171.

## NOTIFY GCF OF A CONTRIBUTION TO YOUR FUND!

*Giving Connection* is a secure, easy and efficient way to notify GCF of gifts you have initiated into your fund. We encourage you to use this feature to simplify communications between GCF and your financial institution.

♥ *Giving Connection*

## Make a Contribution

Please share information about an upcoming contribution to your fund.

|                       |            |                      |            |
|-----------------------|------------|----------------------|------------|
| Add to Fund           | Select     | Amount of Donation   | \$         |
| Asset Type            | Select     | Special Instructions |            |
| Est. Date of Donation | mm/dd/yyyy | Cancel               | SUBMIT NOW |

## WANT TO DONATE TO AN ORGANIZATION?

To ensure that your grants are received by the charitable organizations you support by year end, please submit your recommendation to GCF by **December 21, 2022**.

## GCF IS YOUR PARTNER IN PHILANTHROPY

Our philanthropic advisors are here to help you achieve the greatest impact for the organizations you champion. Contact us at 513-241-2880 to discuss a gift from your estate or an additional fund to further your charitable goals. We are grateful for any referrals you make to your family and friends.