



## 2023 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 [finance@whitefishcommunityfoundation.org](mailto:finance@whitefishcommunityfoundation.org).

Grantmaking	Process	Estimated Time*	Deadline for Donors
Grant Recommendations	Submit online on our <a href="#">Donor Portal</a> or call or email a request.	1 - 5 business days from the time the grant request is received to the time the grant is processed.	Received by the WCF office by December 22, 2023 for grants to be processed by December 29.

Contributions	Process	Estimated Time	Deadline for Donors
Checks	Send a check made payable to Whitefish Community Foundation <b>P.O. Box 1060 Whitefish, MT 59937</b> and indicate the name of the project or fund on the memo of the check.	WCF processes the check based on the day it arrives, not the check date. Please allow 1 week to receive an acknowledgment.	Postmarked or received at the WCF office by December 29, 2023.
ACH Transfer	Please email or call us at (406) 863-1781 and we will send you a form to fill out to initiate the transfer.	Transfers initiated during business hours are received into our account the following business day.	Received in WCF account on or before December 29, 2023
Credit Card Contributions	To make online donations go to the WCF website and click on <a href="#">Donate Now</a> . Or you can call us to donate by credit card over the phone at (406)863-1781.	Donations are received the same day the online gift is made.	Call or stop by the office by December 29 or donate online through the WCF website donation portal by December 31, 2023
Wire Transfers	Please email or call us at (406)863-1781 and we will send you the wiring instructions.	Time depends on financial institution processing the transfer. Can be same day or up to 3 business days.	Received in WCF account on or before December 29, 2023
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.	Timing depends on the broker processing the transfer. Please allow at least 5 business days for this type of gift.	Received in WCF holding account by December 29, 2023.
Deferred Payment Gift Annuity using stock gift	Send gifting instructions to your broker as stated above. Contact WCF to review information for DPGA agreement.	Allow at least 5 days for stock transfer and 1 to 2 weeks to generate DPGA agreement.	Stock donation must be received by WCF no later than December 29, 2023 and meeting to set-up DPGA must be done prior to December 29, 2023.
Deferred Payment Gift Annuity using cash	Set up a meeting time with WCF to review annuity information contract.	Allow 1 to 2 weeks for WCF to generate DPGA agreement.	Cash donation must be received by WCF no later than December 29, 2023 and meeting to set-up DPGA must be done prior to December 29, 2023.

<p>Donor Advised Fund and Private Foundation Grants</p>	<p>Request your grant payable to Whitefish Community Foundation EIN# 81-0533002</p>	<p>Timing depends on the granting organization. Please allow at least 10 business days for processing.</p>	<p>Check payments postmarked on or before December 29, 2023; ACH or wire transfers received in WCF account on or before December 29, 2023</p>
<p>IRA Charitable Rollovers</p>	<p>Request a check from your IRA custodian payable to Whitefish Community Foundation.</p>	<p>Timing depends on the broker. Please allow at least 10 business days for processing.</p>	<p>Postmarked or received at the WCF office by December 29, 2023.</p>