



2019 Year End Giving Guide

The Generosity Journey



The Generosity Journey

Welcome to another holiday season! As the year draws to a close, I look back in wonder at all God has done in 2019. Each of our donors has a unique story, and through your story, God is doing incredible things because of your faithful acts of generosity.

I know how busy the holiday season can be, so I want to make sure you are fully equipped with the information you need to navigate your final year-end giving decisions. One unique opportunity to highlight is donating publicly traded securities. By doing so, you can avoid capital gains taxes and maximize your generosity for your favorite nonprofits through your donor advised fund. Keep reading to learn more on how to do this!

- Cash donations
- Publicly traded stock donations
- Complex asset giving
- IRA charitable distributions
- Grant timelines
- Setting up email notifications for your fund
- Holiday hours for The Signatry

I hope this information helps serve your journey. If you have more questions, please do not hesitate to reach out and ask anyone on the team. Our goal is to help make possible the visions and opportunities with which God has blessed you.

We are honored to be a part of your generosity journey. It is my prayer that your generosity draws you into a closer relationship with God. At the heart of the Christmas story is God's ultimate gift of love so that all might know Him. May that world-changing act of generosity inspire your own life.

Blessings,

A handwritten signature in black ink that reads "Kim Harris".

Kim Harris

Vice President, Donor Care

913-310-0279



Cash Donations

Contributing cash to your Signatry Donor Advised Fund (DAF) can be done through eCheck, credit or debit card, physical check, ACH, or wire transfer. In order to be a tax-deductible gift for 2019, please see the following deadlines and processing information for each type of gift.

PROCESSING TIMES & DEADLINES

eCheck

Deadline: We suggest contributing by **December 20** to ensure full processing is completed. Please note: If there are any transaction errors that delay your contribution beyond December 31, 2019, the gift will be considered a 2020 deduction by the IRS.

Need more help? [Watch a tutorial here.](#)

Credit Card/Debit Card

Deadline: Make your contribution by **December 31**. Please note: If there are any transaction errors that delay your contribution beyond December 31, 2019, the gift will be considered a 2020 deduction by the IRS.

Need more help? [Watch a tutorial here.](#)

Physical Check

Deadline: Post-mark or hand-deliver your check by **December 31**.

Make checks payable to "The Signatry" and write the fund name or number in the memo line.

Please mail to the following address:

The Signatry
7171 W. 95th St., Suite 501
Overland Park, KS 66212

ACH

Deadline: Make your contribution by **December 27**.

[Download the ACH Form here.](#)

Bank Wire

Deadline: Make your contribution by **December 31**.

[Download the Wire Form here.](#)



Publicly Traded Stock Donations

Stock donations are one of the most tax-savvy methods of charitable giving this year. Consider your current portfolio and evaluate possibilities to contribute highly-appreciated stock to your fund.

Timeline

Start the process early to ensure your stocks transfer by year-end. We suggest starting the process by **the first week of December**. Your year-end stock gift will count as a 2019 gift as long as the transfer of ownership is confirmed by our team by **December 31**.

Instructions

Option 1: [Complete and return our stock giving form.](#)

Option 2: Send an email to donorcare@thesignatry.com.

Be sure to include all the details requested on the form.

We recommend doing so by **December 7**.

Once you complete the form, you must initiate the transfer with your financial advisor.

Please call us at 913-310-0279 or email our team at donorcare@thesignatry.com with any of your stock donation questions.

Complex Asset Giving

Traditional giving philosophies tell us that writing a check is always the best way. But using out-of-the-box approaches like complex assets can help you potentially pay fewer taxes, improve your cash flow, and impact your favorite charities with a generosity that goes far beyond the measure of any dollar.

Some examples of assets you can consider are: Real estate, privately held business interests (S-corp, C-corp, LLC), etc.

Timeline

Our Complex Asset team is ready to work with you and your family on your asset giving. There are varying complexities with asset donations.

Please contact our team as soon as possible to start the process at assets@thesignatry.com.



IRA Charitable Distributions

Did you know you can make distributions from your IRA to charity? Qualified Charitable Distributions (QCDs) can be a part of your year-end giving plan with The Signatry. QCDs may be used to satisfy your required minimum distribution.

[*Learn more about this here.*](#)

Talk with your financial advisor about making a distribution from your IRA to a fund at The Signatry.

Timeline

IRA Charitable Distributions are required by IRS regulations to go to a special type of account at The Signatry called a Designated Fund. With this fund, you designate in advance where the funds will be granted. You may open multiple funds to support multiple charities. We recommend starting the process as soon as possible. As long as the distribution is completed and postmarked by December 31, your distribution will count for this year.

You can open a Designated Fund for your charitable distributions by [*completing the application*](#) and returning to The Signatry via the contact methods on the form.

Year-End Grants

Making grants from your fund is the exciting step where your generosity vision takes life. Sign your name to champion the causes of Christ and leave a legacy that lasts.

We know there are many last-minute requests and decisions to be made, so please reach out to us for any questions or assistance needed at [*donorcare@thesignatry.com*](mailto:donorcare@thesignatry.com) or [*913-310-0279*](tel:913-310-0279).

Timeline

To send grants from your fund **by year-end**, please submit grant requests by Wednesday, **December 17**. As a reminder, the date of the grant will not impact your tax situation.

Put in the grant notes the information the charity needs to know, such as if it is for a year-end giving campaign, matching grant, or other time-sensitive situations. We will do our best but cannot guarantee all grants will be processed prior to December 31.



Email Notifications

You can select the email notifications you wish to receive to inform you of your contribution and grant processing status in your fund.

1. Log in to your fund, and in the upper right-hand screen, click the drop-down arrow next to your name.
2. Choose "Email Notifications" from the menu.
3. Select the notifications you wish to receive and click "Save Changes."

You can change these selections at any time. Want more help navigating your fund's features? Contact our Donor Care team at donorcare@thesignatry.com, and they will be glad to walk you through the fund.

Holiday Hours

The Signatry will be closed on the following days to allow our employees time with their families:

Thursday, November 28

Friday, November 29

Monday, December 23

The Kansas City office building will be closed, but phones and emails will be answered.

Tuesday, December 24

Wednesday, December 25

Wednesday, January 1, 2020

Thank you again for being part of The Signatry! We look forward to what God will do through your generosity. You are leaving a legacy as you live out your values and reflect the image of God.