COMMUNITY FOUNDATION
OF MIDDLE TENNESSEE

2026 YEAR-END PROCEDURES: GRANTS & CONTRIBUTIONS

Your support has made a significant impact on our community, and we thank you! As the year-end giving season is fast approaching, we are pleased to provide information to help make your charitable planning smooth and efficient.

Below are guidelines and dates to ensure timely processing of gifts and grants. **Gifts must be received by Thursday, December 31 for 2026 tax purposes.** When making a gift, please indicate the fund name and necessary details so we can accurately process your contribution.

Type of Contribution	Estimated Process Time	Guideline	Deadline
Privately-held Assets *Examples: closely-held stock, partnership, LLC interests*	5-7 business days	Contact: Amy Fair, afair@cfmt.org or 615-695-2782	Friday, November 6
Real Estate	7-10 business days	Contact: Amy Fair, afair@cfmt.org or 615-695-2782	Friday, November 6
IRA Distributions, Charitable Rollover*	3-4 weeks	Contact your IRA administrator and your Relationship Manager.	Friday, November 27
Gift of Stock	3-5 business days	Please check with your broker for exact timing to make a stock transfer. For year-end purposes, electronic transfers should be completed by **December 21**. For stock instructions, please contact donorservices@cfmt.org.	Monday, December 21
Estate Gift *Examples: bequest, IRA, retirement plan beneficiary designations, life insurance*	1-2 business days	Contact: Amy Fair, afair@cfmt.org or 615-695-2782 Cathy Sheffield, csheffield@cfmt.org or 615-321-4939 Ext. 108 Legal name: **Community Foundation of Middle Tennessee EIN# 62-1471789**	Monday, December 28
Gift via Wire Transfer	1-2 business days	Instruct your financial institution to wire your contribution on or before **December 28**. Important: Please identify name of donor or fund. This allows us to timely and properly credit your gifts. **ACH/Wire Instructions:** **Bank Name:** First Horizon Bank, 165 Madison Avenue, Memphis, TN 38103 **Payee Name:** Community Foundation of Middle Tennessee **Account Number:** 101881924940 **ACH Routing Number:** 064005203 **Wire Routing Number:** 084000026 **Swift Code:** FTBMUS44	Monday, December 28 before 3:00 PM

** Rollovers cannot be made to a Donor Advised Fund (DAF)*

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Type of Contribution	Estimated Process Time	Guideline	Deadline
Gift via Check	1-2 business days	**Postmark checks** for CFMT no later than **December 31**. **Hand-deliver checks** to our office, 3421 Belmont Blvd., Nashville TN 37215. Please make sure checks are in an envelope and dropped in the outside mailbox by **Thursday, December 31 before 3:00 PM.** **Important: Please identify name of donor and/or fund in the memo so we can properly credit your gift.**	Thursday, December 31 before 3:00 PM
Gift via Credit Card	1-2 business days	Gifts by credit card must be made by **Thursday, December 31 before Midnight.**	Thursday, December 31

Grant Request	Guideline	Deadline
Year-end Grants	**We encourage you to get your gift in as early as possible. Please submit your grant request no later than December 11.** Request a grant from your donor-advised fund in one of the following ways: • Submitting through the **Fund Advisor Portal** on CFMT.org. • Contacting **donorgrants@cfmt.org** or **615-321-4939**. • Reaching out to your **Relationship Manager**.	Friday, December 11

Important Reminder for Mailed Contributions:
USPS postmark dates may differ from the date you mail your gift. To avoid potential delays or issues with year-end tax deductions, we encourage you to mail contributions well in advance of December 31 or consider electronic giving options. If mailing close to the deadline, request a dated, hand-applied postmark at a USPS retail counter.

Contact a member of our Philanthropic Services Team for assistance::

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Visit CFMT.org for more details.