

January 8th, 2021

Is the deadline for gifts to be delivered to Gift Services to ensure donors receive 2020 tax receipts in compliance with the IRS deadline

Essentials - Updated for Shelter-in-Place conditions

- **Online giving is best!** Encourage donors to use Give.Berkeley.edu for the fastest and easiest processing and receipting.
- **Ask donors to mail gifts directly to Gift Services at 1995 University Ave, Suite 400, Berkeley, CA 94704**
- Gifts received in campus offices can be sent to Gift Services by USPS or Loomis armored service only. Please do not use Campus Mail Services.
 - Continue to use a proper [Transmittal Packet](#)
 - Retain and forward those postmarked envelopes, FedEx/UPS mailing envelopes or waybills!
 - **Campus units may not hand deliver gifts to Gift Services due to the building's closure**
- Do not accept credit card information by phone with intent to transmit to Gift Services for charging. Please ask donors to call Gift Services at **510.643.9789** to give by phone if they cannot give online.

2020 Calendar Year-End Deadlines

<p>Tuesday, December 15th</p>	<ul style="list-style-type: none"> ● Gift Agreements for pledges or outright gifts to establish new funds must be signed by the donor and dean/director, and delivered to Fund Management to be recorded in 2020
<p>Thursday, December 31st</p>	<ul style="list-style-type: none"> ● Securities gifts must be credited in UC Berkeley brokerage account ● Gifts via wire transfer must be credited into UC Berkeley account ● Postmark date for first-class mailed check to count for a donor's 2020 tax records ● Credit cards by phone must be charged by Gift Services. Mailed credit card gifts must be <u>charged</u> in December to qualify as 2020 gifts, regardless of the postmark date. ● Give.Berkeley.Edu online gifts must be made by 11:59pm PST
<p>Friday, January 8th</p>	<ul style="list-style-type: none"> ● Gifts with 2020 postmarks delivered to Gift Services by this date <ul style="list-style-type: none"> ○ will be counted in CADS December 2020 fundraising totals. ○ will have 2020 tax receipts issued in January

Gift Agreements

- Use the [Fiat Docx](#) gift agreement tool to document pledges of \$25,000 or more and *gifts establishing new funds*.
- Agreement review requires 3-10 business days for approval. Alert FundHelp@Berkeley.edu for guidance or questions as early as possible.
- All gift agreement documents must be reviewed and approved by Fund Management before they can be signed by the donor or campus leadership.
- Please send donor and Dean/Director-signed documents to Fund Management for final UDAR signature.

Checks and cash

- Hand-delivery to Gift Services will not be possible through June 2021.
- Donors should mail donations directly to Gift Services at the address below.

Mailing address

Gift Services
University of California, Berkeley
1995 University Ave, Suite 400
Berkeley, CA 94704-1070

Publicly Traded Securities (Stocks)

- Stock transfer forms for [Morgan Stanley](#) and [Charles Schwab](#) can be found on Give.Berkeley.edu
- Please contact the Gift Services Securities Desk **before** the transfer happens to ensure the gift is identified and credited to the donor in a timely manner. Required information is the donor's name and phone number, name of the security(ies), and the fund allocation.
- Donations of mutual funds should be sent to Morgan Stanley only and the Securities Desk **must be informed about mutual funds before they are sent**, to ensure proper receiving procedures are in place
- UC Berkeley Foundation no longer has an account with UBS Financial Services - please delete any old UBS transfer forms or links.

Wire Transfers

- Please be sure to provide wire instructions for the fiduciary where the fund allocation exists
 - Wire instructions for [UC Berkeley Foundation](#)
 - Wire instructions for [UC Regents](#) (*research gifts and Regents endowment funds only*)
- The donor must include fund name or number, and a unit contact number in the payment reference field

Key Contacts

- Gift Services: GiftHelp@berkeley.edu / 643-9789 for general questions about gift processing.
- Securities: GiveSecurities@berkeley.edu / 642-6791 for questions about publicly traded stock.
- Fund Management: FundHelp@berkeley.edu for questions on gift agreements and new funds.
- [Office of Gift Planning](#): for questions about privately-held stock, IRA contributions and tax policy.