

January 9th, 2023

Is the deadline for gifts to be delivered to Gift Services to ensure donors receive 2022 tax receipts in compliance with the IRS deadline

Essentials

- **Online giving is best!** Encourage donors to use Give.Berkeley.edu for the fastest and easiest processing and receipting. Donors may also visit Give.Berkeley.edu/faq for information on other ways to give.
- **Ask donors to mail gifts directly to Gift Services at 1995 University Ave, Suite 400, Berkeley, CA 94704**
- It is strongly preferred that gifts received at campus offices be sent to Gift Services by USPS or Loomis armored service. 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!
- 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.
- You may use the curtailment [out-of-office voicemail/email template](#) to inform donors during office closures.

2022 Calendar Year-End Deadlines

Tuesday, December 13th	<ul style="list-style-type: none"> • Gift Agreements for pledges or outright gifts to establish new funds must be submitted via Fiat Docx.
Friday, December 30th	<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
Saturday, December 31st	<ul style="list-style-type: none"> • Postmark date for first-class mailed check to count for a donor's 2022 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 2022 gifts, regardless of the postmark date. • Give.Berkeley.Edu online gifts must be made by 11:59pm PST
Monday, January 9th	<ul style="list-style-type: none"> • Gifts with 2022 postmarks delivered to Gift Services by this date: <ul style="list-style-type: none"> ◦ will be counted in CADS December 2022 fundraising totals. ◦ will have 2022 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 drafting may require 3-10 business days. Alert FundHelp@Berkeley.edu for guidance or questions as early as possible.
- Fund Stewardship & Compliance uses DocuSign to collect all agreement signatures. More information about the DocuSign process can be found [here](#).

Checks and cash

- Hand-delivery to Gift Services is available but discouraged. Please use USPS or Loomis armored service.
- Donors should mail donations directly to Gift Services at the address below.

Address for hand-delivery

(please call in advance)

1995 University Ave
4th Floor Reception Desk
510-642-1212
Mon-Fri 8am - 4pm

Address for mail from donors

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

Individual Retirement Accounts

- Donors should ask their IRA custodian to include information identifying them as the donor, as well as the purpose of the gift
- Donors who are custodians of their account must ensure that their gift is delivered to Gift Services by December 31st to qualify as a 2021 contribution

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 Stewardship & Compliance: 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.