CJP Donor Advised Fund 2025 Year End Deadlines

Grant Recommendations

- CJP must receive your grant recommendations by **5PM EST on December 19th** for 2025 electronic payment or postmark.
- This includes grant recommendations submitted by mail, fax, email or online.
- Please note that all charities must be vetted under CJP guidelines prior to being approved as grant recipients.

Contributions by Check or Wire Transfer

- Contributions by check or wire must be received no later than **December 19th** to be credited to your fund in 2025.
- Checks received by mail after December 19th, and postmarked in 2025, and any wires received in CJP's account prior to the end of 2025, will be acknowledged as calendar year 2025 donations but will be credited to your fund in 2026.
- Please note our secure lockbox address for check donations to Donor Advised Funds only: **Combined Jewish Philanthropies, PO Box 723 Reading, MA 01867-0413**

Contributions by Credit Card

- Contributions received and charged prior to the end of 2025 will be acknowledged as 2025 donations, but may be credited to your fund in 2026.
- To contribute by credit card, go to www.cjp.org/DAF and click on "Contribute to a DAF"
- As in past years, credit card contributions will be credited to your fund net of applicable credit card processing fees.

Contributions of Securities via DTC Transfer

- Due to year-end trading volume, we recommend that you initiate DTC transfers with your brokerage allowing sufficient time for receipt by CJP by **December 19th.** This will help ensure your gift is received in CJP's account prior to year-end.
- Note that securities arrive via DTC with no donor information. It is essential that you or your advisor contact CJP at the time of transfer to give us the donor name, the security being transferred and the number of shares.
- If you are initiating a transfer of securities from a Direct Registration Account via a transfer agent such as Computershare, Broadridge or Equinti/AST, we recommend that you start the process in early December due to additional paperwork that may be required by the transfer agent.
- Please allow for additional processing time for securities trading on non-US exchanges.
- Any securities received in CJP's account after December 19th will be receipted as calendar year 2025 donations but will be credited to your fund in 2026.

Contributions of Mutual Fund Shares

- Gifts of some mutual fund shares can take several weeks to complete due to fund policies, especially if the shares are held at the fund manager rather than a broker.
- Please plan to begin the transfer process no later than the **first week of December** and contact CJP before beginning the transfer process for mutual fund shares so that we can help with paperwork as needed.

Gifts of Less Liquid Assets

- Gifts of less liquid assets such as real estate, non-publicly traded securities, cryptocurrency and limited partnerships are subject to the review of CJP's confidential Gift Review Group and can take up to four weeks to complete. Please contact CJP if you are considering a gift of less liquid assets for more information on due diligence and approval timelines and requirements.

CJP Donor Advised Fund Contacts

General questions or notice of incoming gifts:	CJP Philanthropic Asset Services (PAS) Team pas@cjp.org
Grant recommendations:	dafgrants@cjp.org
Contribution by check or credit card:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjp.org
Contribution of securities or cryptocurrency:	Conrad Cheung, Associate Director, Philanthropic Asset Services 617-457-8517 conradc@cjp.org
Contribution by bank wire:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjp.org
Contribution of Israel Bonds:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjp.org
Contribution of less liquid assets and changes to investment options:	Charlie Glassenberg, Vice President, Risk Management & Investment Partnerships 617-457-8540 charlesg@cjp.org
Changes to addresses, signatories or Fund name, and all other matters:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjp.org Marik Gesin, Operations Associate, Finance 617-457-8527 marikg@cjp.org