



CJP Donor Advised Fund 2026 Year End Deadlines

Grant Recommendations

- CJP must receive your grant recommendations by **5PM EST on December 18th** for 2026 electronic payment or postmark.
- This includes grant recommendations submitted by mail, 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 18th** to be credited to your fund in 2026.
- Checks received by mail after December 18th, and postmarked in 2026, and any wires received in CJP's account prior to the end of 2026, will be receipted as calendar year 2026 donations but will be credited to your fund in 2027.
- 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 2026 will be acknowledged as 2026 donations, but may be credited to your fund in 2027.
- To contribute by credit card, go to www.cjp.org/DAF and click on "Contribute to a DAF"
- 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 18th**. 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 Equiniti/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 between December 19th – December 31st will be receipted as calendar year 2026 donations but will be credited to your fund in 2027.

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@cjpp.org PAS Hotline: 617-457-8822
Grant recommendations:	dafgrants@cjpp.org
Contribution by check, credit card:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjpp.org
Contribution of securities or cryptocurrency:	stockgifts@cjpp.org Or contact Conrad Cheung, Associate Director, Philanthropic Asset Services 617-457-8517 conradc@cjpp.org
Contribution by bank wire:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjpp.org
Contribution of Israel Bonds:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjpp.org
Contribution of less liquid assets:	Charlie Glassenberg, Vice President, Risk Management & Investment Partnerships 617-457-8540 charlesg@cjpp.org
Changes to or questions about investment options:	Amanda Kirschenbaum, Senior Director, Donor Advised Funds and Investment Partnerships 617-457-8692 amandak@cjpp.org
Changes to addresses, signatories or Fund name, and all other matters:	José Santiago, Accounting Manager, Philanthropic Asset Services 617-457-8858 joses@cjpp.org Marik Gesin, Operations Associate, Finance 617-457-8527 marikg@cjpp.org