

## **Nova Southeastern University Year-End Giving Information**

**TO: All Advancement Staff**

**FROM: Josem Diaz, Assistant Director - Advancement Services**

In order to serve our year-end donors during the University's official winter break, we are recommending and implementing the following guidelines and procedures:

- **Direct Mail** – These gifts will be processed this year the same as in previous years.
  - The last official processing day prior to the winter break is December 21, 2012. We cannot guarantee gifts delivered after this date will be processed in 2012. Please submit envelopes indicating postmarked date prior to 2013 with transmittals after this date to be able to process gifts for the year 2012.
  - As noted below, for donor tax-deduction purposes, our first priority during the holidays will be processing credit card donations. We will, however, strive to process as much direct mail as remaining time permits. We have made arrangements with Mail Services to collect our mail throughout the holidays.
  
- **Credit Card Gifts** – It is important for our donors to know that the date of their credit card gift is the date the gift is processed by their financial institution (not when received or processed by us). Therefore, it must be actually processed on or before December 31, 2012 to be treated as a deduction in this calendar year. This happens instantly – and is receipted immediately – when processed through the University Advancement online donation site. As indicated below, you should encourage donors to give through that website.
  - Communications with donors should encourage those making credit card gifts via mail to post them by December 15 so they will arrive in our offices by December 31. Otherwise, they *may* not be processed until 2013. It is illegal for us to backdate gifts.
  - Those wishing to make an online gift via credit card should be directed to the official University Advancement website <http://www.nova.edu/giving>. Online gifts must be completed by 11:59 p.m. on December 31, 2012. We encourage donors not wait until the last minute, however, as we cannot guarantee their internet connectivity.
  - We will have staff on call during the holiday to speak with donors should they prefer to have us enter their credit card information for them. Credit card gifts will be processed by our staff through 11 a.m. EST on December 31, 2012 at 954-262-2100.

- Please advise donors to alert you about their year-end plans for gifts of securities, to discuss the transfer procedures, and keep Advancement Services informed of pending transfers.
  - Please advise donors to provide the following information when they transfer securities:
    - Donor Name
    - Name of Security(ies)
    - Number of Shares (or type of security for others)
    - Expected Date of Transfer
    - Transferring Brokerage Firm
    - Name of Fund Receiving Gift
  - The securities must be **received in** one of our brokerage accounts with Northern Trust Securities by December 31, 2012 in order to be deductible in **2012**.
  - If the donor is delivering actual stock certificates, encourage them to have those delivered thru the Finance office by December 14 so all of the paperwork and transactions can take place by December 31, 2012. It is important to have the opportunity to secure the donor signatures on the correct forms.
  - For more information on stock and wire transfers please refer to the GASP [http://www.nova.edu/advancement/forms/secure/gift\\_acceptance\\_policies.pdf](http://www.nova.edu/advancement/forms/secure/gift_acceptance_policies.pdf)
- **Donor Assistance**
    - During the official holiday break, we will be available to assist donors should they need help processing a credit card gift, transferring securities, or to assist with any other questions:
      - Advancement Services and Development staff members will be on site during December 26-31, 2012.

I encourage you all to post these guidelines on your websites, as we will on ours, and put appropriate recordings on your telephones to direct donors to the appropriate office for assistance during the holiday closure.