

Year-End Checklist:

✓ PLAN AHEAD ✓ MAKE YOUR GIFT ✓ CELEBRATE!



Year-End Checklist: In this season of giving, charitable gifts to your favored organizations—like Northeastern University—offer valuable support, and may help you achieve your charitable and financial goals. **Here’s a list to help you plan ahead, make your gift, and celebrate!**

- Cash and Appreciated Securities.** Cash gifts to qualified charities can be deducted up to 60% of your Adjusted Gross Income (AGI). For gifts of appreciated securities (held more than one year) there will be no capital gains tax due, and the fair market value can be deducted up to 30% of your AGI. For itemizers, any unused deduction may be carried forward for an additional five years.
- Qualified Charitable Distributions (QCDs) from IRAs.** These gifts can satisfy all or a portion of your Required Minimum Distribution. You must be at least 70½ or older, and the distribution must come directly from your IRA administrator. QCD gifts are not included in your AGI.
- Grants from Donor Advised Funds (DAFs).** You have already received your charitable deduction for funding your DAF—now’s the time to direct a grant to organizations that mean the most to you.

Year-end giving may require early action, so begin planning now!

For mailing, wire transfer instructions, or information on Northeastern’s Donor Advised Fund, go to Ways to Give at giving.northeastern.edu or contact the Office of Gift Planning.

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