THOMAS JEFFERSON'S Poplar Forest

# Year-End Giving Guide

To make your gift count for 2026, here is when to start. These are the dates we recommend, set early enough so that your gift has time to clear. Your own advisor, broker, or account custodian may have different cutoffs, so please check with them as well.

## Gifts of Stock or Other Securities
**START BY TUESDAY, DECEMBER 15**

Electronic transfers take several business days, and the gift is dated when the shares land in our account rather than when you request the transfer. Starting in mid-December leaves room if anything needs a second try.

WHAT YOUR BROKER WILL NEED:

Account Name: The Corporation for Jefferson's Poplar Forest ("TJPF")
Depository Trust Code (DTC): 0443
TJPF Account#: DA4006437
Broker: Davenport & Company LLC
Tax ID Number: 54-1258296

Transfers arrive without donor names attached, so please tell us at Renee@Poplarforest.org when you initiate, and we will watch for it. Give online at poplarforest.org/support/donate/stock-gifts/

## Grants from a Donor-Advised Fund
**START BY TUESDAY, DECEMBER 15**

Your sponsor processes the grant and then mails or transfers the funds, which takes time at the busiest point of their year. Recommend early so the grant reaches us this year.

WHAT YOUR SPONSOR WILL ASK FOR:

Legal Name: The Corporation for Jefferson's Poplar Forest
EIN: 54-1258296
Mailing Address: PO Box 419, Forest, VA 24551

Searching by EIN avoids any mix-up with similarly named organizations.
Give online at poplarforest.org/daf-direct/

## Gifts from an IRA, if you are 70½ or older
**START BY TUESDAY, DECEMBER 15**

Most custodians mail a paper check, and their internal cutoffs come earlier than people expect. This is the deadline we recommend starting the process early. If you are 73 or older, a gift made this way can also satisfy your required minimum distribution.

WHAT YOUR IRA CUSTODIAN WILL NEED:
Ask them to send a qualified charitable distribution to The Corporation for Jefferson's Poplar Forest, EIN 54-1258296, at PO Box 419, Forest, VA 24551.

Please contact us at renee@poplarforest.org when you initiate. These checks arrive from the custodian rather than from you, and a heads up lets us thank you properly.

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## Checks by Mail
**POSTMARKED BY THURSDAY, DECEMBER 31**

A check postmarked December 31 counts for this year even if it reaches us in January. Mail to PO Box 419, Forest, VA 24551.

## Credit Card and Online Gifts
**SATURDAY, DECEMBER 31 by 11:59 PM**

This is the latest you can give and still have it count for this year. Give online at https://www.poplarforest.org/support/donate/

## Gifts from a Will, Retirement Account or Life Insurance
**Worth A Conversation Anytime**

Naming Poplar Forest as a beneficiary of a retirement account or life insurance policy takes one form from your provider and no attorney. Those forms decide where the account goes regardless of what a will says, so they are worth a look even if your plans are already in place.

WHO TO TALK TO:
Renee Rose Flowers, Director of Development
434-534-8129
renee@poplarforest.org

If you have already included us, please let us know so we can thank you. Learn more at poplarforest.org/support/donate/planned-giving/

## Office Holidays

Our office is closed for the holidays on Wednesday, November 25th; Thursday, November 26th; Friday, November 27th; Thursday, December 24th; and Friday, December 25th. We will be available to assist with any of your giving needs outside of these days.

## Development Office Contacts:

Renee Rose Flowers, Director of Development
renee@poplarforest.org
434-534-8129

Laura Murphy, Annual Fund & Campaign Manager
laura@poplarforest.org
434-534-8116

*This information is educational and is not legal or tax advice. Deadlines vary by broker, donor-advised fund sponsor, and IRA custodian. Please confirm timing and tax treatment with your own advisors.*