

2009 North Carolina State University Year-End Giving Information

TO: All Development Officers

FROM: John Taylor, Associate Vice Chancellor for Advancement Services

In order to serve our year-end donors during the University's official holiday period, we are recommending and implementing the following guidelines and procedures as we did last year:

- **Direct Mail** – These gifts will be processed this year the same as in past years.
 - The cut-off date for processing prior to the holiday will be gifts received in the mail by December 23, 2009.
 - As noted below, for donor tax-deduction purposes, our priority during the holidays will be processing credit card donations. We will, however, strive to process as much direct mail as time permits. We have made arrangements with Mail Services to collect our mail (Box 7474 and Box 7501). Remaining gifts will be processed upon return from winter break.
- **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 by us). Therefore, it must be actually processed on or before December 31, 2009 to be counted as a deduction in this calendar year.
 - In your communications with donors, encourage those making credit card gifts via mail to have them in the mail by December 15th so they will arrive in our offices by the cut-off for gift processing prior to the holidays. Otherwise, they will not be processed until 2010. It is illegal for us to backdate these gifts.
 - Those wishing to make an on-line gift via credit card can be directed to the secure annual giving site at https://www6.acs.ncsu.edu/ccg-og/faces/oag_og.jsp Web gifts must be completed by 11:59 p.m. EST on 12/31/09. We encourage donors not to wait until the last minute, however, as we cannot guarantee availability of NelNet – our current third party credit card processor.
 - We will have staff on call during the holiday to speak with donors and our staff can enter their information on-line for them (if the donor is comfortable with that). Credit card gifts will be processed through the end of the business day 12/31/09. The telephone number for these transactions is (919) 515-7827.
- **Gifts of Securities**
 - Advise donors to call the Office of Planned Giving at (919) 515-5106 or Steve Watt at (919) 515-9076 to discuss the transfer procedures.
 - The securities must be received in one of our brokerage accounts with BB&T Investment Services by December 31, 2009 in order to be counted and deducted in this calendar year.
 - Please advise them we need the following information when they transfer securities

- Donor Name
- Security Name
- Number of Shares (or type of security for others)
- Date of Transfer
- Transferring Broker
- Name of Fund Receiving Gift
- If the donor is delivering actual stock certificates, encourage them to have them delivered to us by December 18th so all of the paperwork and transactions can take place prior to December 31, 2009. It is important that we have the opportunity to secure the correct signatures and Medallion Signature Guarantees on the necessary documents to complete these transactions.
- **Donor Assistance**
 - During the official holiday break, we will have two methods available to assist donors should they need help processing a credit card gift, transferring securities, or to assist with any other questions.
 - The Office of Planned Giving will be working each morning and be available at (919) 515-5106. Steve Watt's mobile phone number is a backup at (919) 218-1344.
 - Advancement Services staff members will be on site during normal business hours December 28-31, 2009. Additionally, Advancement Services Help Desk will continuously check for messages left at (919) 515-7827 and assist donors as needed.

I encourage you all to post these guidelines on your web sites and put appropriate recordings on your telephones to direct donors to the appropriate offices for assistance during the holiday closure.