

## **End of Year Giving Instructions**

Please notice that all school offices will be closed for the holiday season. If you wish to make your gift in the 2011 tax year, please use the following guidelines:

### **Checks:**

Checks must be postmarked or delivered to the Advancement Office on or before December 31 to qualify for a 2011 deduction.

### **Credit Card:**

If you are mailing your gift, notice that the gift date is recorded as the date on which the charge is made to your credit card, not the date you give your credit card number to the school. The Advancement Office must receive your credit card information by **noon on Friday, December 30** to make the charge in 2011.

If you are making your gift online, your credit card will be charged when you complete the transaction. Please make sure to complete your transaction before midnight on December 31 to have it counted in the 2011 tax year. To make your gift online, please [click here](#) .

### **Stock (direct transfers):**

The gift date is recorded as the date on which the stock is transferred into St. Margaret's gift account, not the date on which you advise your broker to make the gift. Please request the transfer and notify the Advancement Office no later than December 23. It often takes a few days to verify transfers, particularly during the holidays, and we want to make sure your transfer is completed by December 31. Transfer instructions are available [here](#) .

For more information or to make your gift during the holiday break, please contact the Advancement Office at (949) 661-0108 extension 353 or [annualfund@smes.org](mailto:annualfund@smes.org) and a staff member will get back to you within 24 hours.