



## 2022 GRANTING GUIDELINES



To ensure timely delivery of grants by year end, please carefully follow the instructions below. For more information, assistance, or questions, please contact **(414) 291-2500** or [donorservices@bradleyimpactfund.org](mailto:donorservices@bradleyimpactfund.org).

Action Needed	Timing
Log in to your Bradley Impact Fund donor-advised account at: <a href="https://mybradleyimpactfund.force.com/portal/s/login">https://mybradleyimpactfund.force.com/portal/s/login</a> and click on "Recommend a Disbursement." Or call us at <b>(414) 291-2500</b> .	To ensure processing by year end, grant recommendations* must be submitted by 5:00 p.m. Central Time on <b>December 20</b> .  <i>*New grant recipient organizations are subject to review by the Grants Committee, which may delay processing.</i>

## 2022 CONTRIBUTION GUIDELINES

The type of asset, and how quickly it is transferred by the institution currently holding it, may impact the Bradley Impact Fund's ability to receive contributions by year end.

Type of Contribution	Action Needed	Timing
<b>Checks</b>	Checks made payable to Bradley Impact Fund should be mailed to: <b>Bradley Impact Fund</b> <b>1400 N. Water Street, Suite 300</b> <b>Milwaukee, WI 53202</b>	Mail must be postmarked by <b>December 31</b> to be counted in the 2022 tax year.
<b>Mutual Funds</b>	To contribute <b>closed-end mutual funds</b> , provide instructions to the transferring firm: <b>Name of Account:</b> <b>Bradley Impact Fund, Inc.</b> <b>Account number: 2862-5996</b> <b>DTC Number: 0141</b> <b>(Wells Fargo Clearing Services, LLC)</b> Notify Bradley Impact Fund at <b>(414) 291-2500</b> .  To contribute <b>open-end mutual funds</b> , please contact Bradley Impact Fund at <b>(414) 291-2500</b> so that we may provide the necessary custom information to the financial institution.	Processing times can vary, but typically will take <b>two weeks</b> for closed-end mutual funds and up to <b>four weeks</b> for open-end mutual funds. To ensure proper processing, we suggest initiating this request by <b>December 1 for open-end mutual funds and December 15 for closed-end mutual funds</b> . Assets must be received by <b>December 31</b> to be counted in the 2022 tax year.

## 2022 CONTRIBUTION GUIDELINES *continued*

Type of Contribution	Action Needed	Timing
Publicly Traded Stock Transfers	<p>Initiate a transfer request to the firm holding the securities, and include Bradley Impact Fund's information:  <b>Name of Account:</b>  <b>Bradley Impact Fund, Inc.</b>  <b>Account number: 2862-5996</b>  <b>DTC Number: 0141 (Wells Fargo Clearing Services, LLC)</b>            Notify Bradley Impact Fund at (414) 291-2500.</p>	<p>Processing times can vary, but securities typically will transfer overnight once initiated. It is recommended to initiate by <b>December 28</b> to ensure timely delivery. However, please check with your financial firm. Assets must be received by <b>December 31</b> to be counted in the 2022 tax year.</p>
Credit Card	<p>Visit: <a href="https://bradleyimpactfund.org/give">https://bradleyimpactfund.org/give</a> or call Bradley Impact Fund at (414) 291-2500.</p>	<p>Contribution must be received by 11:59 p.m. Central Time on <b>December 31</b> to be counted in the 2022 tax year.</p>
Corporate Contributions, Donor-Advised Funds, and Community Foundations	<p>Provide <b>EIN 45-4678325</b> for the Bradley Impact Fund and follow the instructions provided here for the appropriate type of contribution. Contact Bradley Impact Fund at (414) 291-2500 for any additional information required by the organization.</p>	<p>Contribution must be postmarked or received by 11:59 p.m. Central Time on <b>December 31</b> to be counted in the 2022 tax year.</p>
Crypto Currency	<p>Visit: <a href="https://invest.bradleyimpactfund.org/givecrypto">https://invest.bradleyimpactfund.org/givecrypto</a>.</p>	<p>Contribution must be received by 11:59 p.m. Central Time on <b>December 31</b> to be counted in the 2022 tax year.</p>
Other Assets, Non-publicly Traded Assets Including Private Company Stock, Hedge Fund Interests, Private Equity, Cash Transfer, etc.	<p>Call Bradley Impact Fund at (414) 291-2500 to discuss.</p>	<p>The type of asset, and how quickly it is transferred by the institution currently holding it, may impact the Bradley Impact Fund's ability to receive contributions by year end. The contribution must be received by 11:59 p.m. Central Time on <b>December 31</b> to be counted in the 2022 tax year.</p>
IRA Contribution	<p>Qualified Charitable Distributions (QCD) may be made to one of the Bradley Impact Fund's Issue Funds. Please call the Bradley Impact Fund at (414) 291-2500 to discuss. Please note that any distribution from your IRA account to a Personal Giving Account is not a QCD for tax purposes.</p>	<p>Contribution must be postmarked or received by 11:59 p.m. Central Time on <b>December 31</b> to be counted in the 2022 tax year.</p>