



BRADLEY
IMPACT FUND®

PRINCIPLED PHILANTHROPY

A photograph of a man and a woman sitting on a grey couch in a modern living room. The man, with grey hair and a beard, is wearing a blue denim shirt over a pink t-shirt and is holding several white papers. The woman, with dark hair in a bun, is wearing a white top and a grey cardigan, and is holding a black pen. They are both looking at a laptop on a table in front of them. The background shows a bright, airy room with a wooden dining table and a green plant.

**2024 YEAR-END
CONTRIBUTION GUIDELINES**



Many in our donor community choose to make grants to organizations or contribute into their donor-advised fund account during the last several weeks of the year. We hope these handy guidelines will help as you do so. Should you need more information, assistance, or have questions, our staff is ready to help when you contact us at (414) 291-2500 or donorservices@bradleyimpactfund.org.

2024 YEAR-END GRANTING GUIDELINES



To make a grant recommendation, please log in to your Bradley Impact Fund donor-advised account at: <https://bif.my.site.com/portal/s/login/> and click on “Recommend a Disbursement.” Recommendations* must be submitted by 5:00 p.m. Central Time on **December 20** to ensure processing by year end.

**New grant recipient organizations are subject to review by the Grants Committee, which may delay processing.*

2024 YEAR-END CONTRIBUTION GUIDELINES



When making a contribution to the Bradley Impact Fund, please carefully follow instructions according to asset type below. The type of asset, and how quickly it is transferred by the institution currently holding it, may affect the Bradley Impact Fund’s ability to receive contributions by year end. Email donorservices@bradleyimpactfund.org or call us at (414) 291-2500 for additional information or questions.

Asset Type	Donor Action Needed	Timing
ACH/Electronic Funds Transfer	<p>Donor should provide this information to the sending institution:</p> <p>Bank: Wells Fargo Bank, N.A. City: Milwaukee State: WI Account number: 1513116879 Routing number: 075911988</p> <p>To ensure appropriate credit, please call Bradley Impact Fund at (414) 291-2500 to notify of gift.</p>	<p>Transfers typically take one business day, depending on the close time of the sending institution. Contribution must be received by 11:59 p.m. Central Time on December 31 to be counted in the current tax year.</p>

YEAR-END CONTRIBUTION GUIDELINES *continued*

Asset Type	Donor Action Needed	Timing
Checks	Checks made payable to Bradley Impact Fund should be mailed to: Bradley Impact Fund 1400 N. Water Street, Suite 300 Milwaukee, WI 53202	Mail must be postmarked by December 31 to be counted in the current tax year.
Credit Card	Donor should visit bradleyimpactfund.org/give or call Bradley Impact Fund at (414) 291-2500 .	Contribution must be received by 11:59 p.m. Central Time on December 31 to counted in the current tax year.
Corporate Contributions, Donor-Advised Funds, and Community Foundations	Donor should provide EIN 45-4678325 for the Bradley Impact Fund and follow instructions provided here for appropriate asset type.	Contribution must be postmarked or received by 11:59 p.m. Central Time on December 31 to be counted in the current tax year.
Mutual Funds	<p>Donor should contact their broker to determine whether funds are closed-end or open-end. Prior to transferring, many institutions require paperwork that includes custom information that would be provided by the Bradley Impact Fund. Please provide us with a contact at your financial institution by calling (414) 291-2500.</p> <p>To contribute closed-end mutual funds provide instructions to transferring firm, this may involve paperwork from firm: Name of Account: Bradley Impact Fund, Inc. Account number: 2862-5996 DTC Number: 0141 (Wells Fargo Clearing Services, LLC) To ensure appropriate credit, please call Bradley Impact Fund at (414) 291-2500 to notify of gift.</p> <p>To contribute open-end mutual funds, donor should contact Bradley Impact Fund at (414) 291-2500 prior to initiating transfer with brokerage. This process requires we provide individualized information to the financial institution.</p>	<p>Processing times can vary, but typically will take two weeks for closed-end mutual funds and up to four weeks for open-end mutual funds. To ensure proper processing, we suggest initiating this request by December 1 for open-end mutual funds and December 15 for closed-end mutual funds. Assets must be received by December 31 to be counted in the current tax year.</p>

YEAR-END CONTRIBUTION GUIDELINES *continued*

Asset Type	Donor Action Needed	Timing
<p>Publicly Traded Stock and Bond Transfers</p>	<p>Donor should initiate a transfer request to the firm holding the securities and include Bradley Impact Fund's information: Name of Account: Bradley Impact Fund, Inc. Account number: 2862-5996 DTC Number: 0141 (Wells Fargo Clearing Services, LLC) To ensure appropriate credit, please call Bradley Impact Fund at (414) 291-2500.</p>	<p>Processing times can vary, but securities typically will transfer in 2-3 days once initiated. It is recommended to initiate transfer two weeks prior to wanting to make grants with funds. Assets must be received by December 31 to be counted in the current tax year.</p>
<p>Wire Transfer</p>	<p>Donor should provide this information to the sending institution: Bank: Wells Fargo Bank, N.A. Address: 420 Montgomery Street, San Francisco, CA 94104 Account number: 1513116879 Routing number: 121000248 To ensure appropriate credit, please call Bradley Impact Fund at (414) 291-2500 to notify of gift.</p>	<p>Wire transfers occur immediately within the sending financial institution's timeframe. Contribution must be received by 11:59 p.m. Central Time on December 31 to be counted in the current tax year.</p>
<p>Other Assets, Non-publicly Traded Assets Including Private Company Stock, Hedge Fund Interests, Private Equity, Cash Transfer, etc.</p>	<p>Donor should call Bradley Impact Fund (414) 291-2500 to discuss.</p>	<p>The type of asset and how quickly it is transferred by institution currently holding it may affect the Bradley Impact Fund's ability to receive contributions by year end. Contribution must be received by 11:59 p.m. Central Time on December 31 to be counted in the current tax year.</p>
<p>IRA Contribution</p>	<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 Donor-Advised Fund account is not a QCD for tax purposes.</p>	<p>Contribution must be postmarked or received by 11:59 p.m. Central Time on December 31 to be counted in the current tax year.</p>