

## GUIDELINES FOR END-OF-YEAR 2021 DONATIONS

Below are the suggested dates for donations to be received in order to have your donation eligible for a 2021 charitable tax deduction. The end of the year is a busy time for all financial institutions, and any requests submitted after these dates will be processed on a best effort basis. To ensure that your security transfer is received by the last business day of the year, December 31, 2021, we encourage you to make your transfers as early as possible.

FORM OF GIFT	ADVICE TO DONOR	TIMING
Check	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Cash form</b>, along with a check, <i>must be placed in the mail</i> on or before December 31, 2021. We highly recommend obtaining a post office receipt.</li> </ul>	In the mail by <b>December 31, 2021</b>
Wire transfer of cash	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Cash form</b> and cash sent via wire transfer <i>must be received</i> on or before December 31, 2021.</li> </ul>	Received by <b>December 31, 2021</b>
Transfer of stocks from a T. Rowe Price Brokerage account	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Mutual Funds or Securities form</b> or online submission or telephone transfer <i>should be received</i> on or before December 20, 2021.</li> </ul>	Received by <b>December 20, 2021</b>
Transfer of stocks from a transfer agent	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Mutual Funds or Securities form</b> and all original applicable forms required by the transfer agent <i>should be received</i> via mail on or before November 15, 2021.</li> <li>Prior to mailing, donors should contact the transfer agent to find out their requirements for a transfer request. Send all original paperwork to us. We will complete and sign as the new owner of the shares and submit originals to the transfer agent.</li> <li>The receiving account name is always The T. Rowe Price Program for Charitable Giving, not the name of your giving account.</li> </ul>	Received by <b>November 15, 2021</b>
Transfer of stocks from an account outside T. Rowe Price	<ul style="list-style-type: none"> <li>A copy of the completed <b>Contribution of Mutual Funds or Securities form</b> <i>should be received</i> by the Program via fax or mail on or before December 13, 2021.</li> <li>Donors <i>must provide</i> delivery instructions to the brokerage firm holding their securities. Delivery instructions for external firms are provided on page 2 of the <b>Contribution of Mutual Funds or Securities form</b>.</li> <li>The brokerage firm holding the donors' securities must initiate the in-kind transfer of securities. Donors are advised to check with the brokerage firm holding their securities regarding the firm's deadlines for end-of-year transfers.</li> </ul>	Received by <b>December 13, 2021</b>
Gift of securities in certificate form	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Mutual Funds or Securities form</b> and properly endorsed stock certificates <i>must be placed in the mail</i> on or before December 31, 2021. We recommend sending the certificates via registered mail and insured for 2% of the value via the United States Postal Service to confirm the date the securities were mailed and to protect against loss.</li> </ul>	In the mail by <b>December 31, 2021</b>

(Table continued on reverse)

Associates are available at 1-800-690-0438 Monday–Friday, 8 a.m. to 8 p.m. eastern time to assist you.

FORM OF GIFT	ADVICE TO DONOR	TIMING
Mutual funds from an account at T. Rowe Price	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Mutual Funds or Securities form</b> or online submission or telephone transfer <i>should be received</i> on or before December 20, 2021.</li> </ul>	Received by <b>December 20, 2021</b>
Mutual funds from an account outside of T. Rowe Price	<ul style="list-style-type: none"> <li>A completed <b>Contribution of Mutual Funds or Securities form</b> and a <u>copy</u> of your entire account statement <i>should be received</i> via fax or mail before November 15, 2021.</li> <li>Donors are advised NOT to send requests to transfer shares of mutual funds without first consulting with the mutual fund company or broker holding their mutual fund shares to check the end-of-year transfer deadlines.</li> </ul>	Received by <b>November 15, 2021</b>

When mailing forms to T. Rowe Price Charitable close to the deadline dates, we recommend sending them via certified mail. You may also fax your completed forms to **1-800-619-9262**. If your donation is time sensitive, please call us at **1-800-690-0438** to confirm receipt. Donors are advised to seek professional tax advice regarding questions related to year-end donations.

## HELPFUL HINTS

### Transferring stocks from a financial institution other than T. Rowe Price

Be sure to complete the form required by the delivering firm and send it to the financial institution holding the securities. When completing the external transfer form, please list the receiving account name as The T. Rowe Price Program for Charitable Giving and do not list your four-digit giving account number as the receiving account number. The proper receiving account numbers are listed on the second page of the **Contribution of Mutual Funds or Securities form**, which some firms will accept as an alternative transfer form. Whichever form you use, be sure to inform us of the planned contribution by sending a copy of the form, calling, or submitting the information via your online account. When stocks are transferred from other financial institutions, the owner's name is not included. If we are not informed of the incoming transfer, we cannot sell the security and add the proceeds to your giving account in a timely manner.

### Transferring mutual funds from a financial institution other than T. Rowe Price

To initiate the transfer, T. Rowe Price Charitable must have a copy of the most recent financial statement from the financial institution holding the mutual fund. This statement should list the full account number, account registration, full name(s) on the account, and all mutual funds to be transferred. We cannot initiate the transfer without a copy of the statement. The statement should accompany a completed **Contribution of Mutual Fund or Securities form**.

After November 15, please call **1-800-690-0438** before transferring any mutual fund to us. This allows us to confirm that we will receive your donation by December 31, 2021.

## GRANT RECOMMENDATIONS

Due to year-end granting volumes, we request that all 2021 recommendations be submitted by December 15 for processing by calendar year-end. Grant recommendations received after this date will be processed in the order received with best efforts to issue by year-end. Grant recommendations can be submitted via the **Grant Recommendation form**, phone, or online.

**Associates are available at 1-800-690-0438 Monday–Friday, 8 a.m. to 8 p.m. eastern time to assist you.**

**You can also email [questions@trowepricecharitable.org](mailto:questions@trowepricecharitable.org).**

**All forms are available on our website, [trowepricecharitable.org](http://trowepricecharitable.org), under Resources.**