



HAPPY HOLIDAYS from Advancement Operations!
Sharing Good Cheer and.....

IMPORTANT PROCESSING DEADLINES AND INFORMATION

With the December holiday quickly approaching, we would like to make everyone aware of our processing deadlines for 2023.

All gifts, pledges and pledge payments must be submitted to Finance & Budget by 4:30pm on Thursday, December 21st. This deadline will allow the Finance & Budget Team the ability to ensure submissions are processed before closing on December 22nd. The last day to process credit card donations is Wednesday, December 20th. Payments received after 4:30pm on the 21st will not be handled until our return in 2024, but will qualify for a 2023 tax receipt if eligible.

A few reminders.....

When submitting gifts and pledges to our office **all required documentation and information must be provided (ie. account #'s, LookUp Ids, etc) or we cannot guarantee a seamless processing experience for you.** The Remittal can be found on the Advancement Operations website <https://advancement.uwo.ca/pdf/FacultyGiftandPledgeRemittalForm.pdf> All gifts and pledges requiring new account/project setups must be submitted to Advancement Operations as early as possible this month to allow appropriate lead time for the financial process.

Encourage donors to visit the online giving site <https://www.westernconnect.ca/donateWestern.html> to make their donations over the holidays. All eligible online gifts and pledge payments received prior to midnight on December 31st will be issued a 2023 electronic receipt.

All envelopes must be retained and submitted with gifts received over the holidays. Envelopes bearing a postmark of December 31st or prior are eligible for a 2023 tax receipt. If you are dealing with any groups or contacts outside of your

immediate area, who collect donations, we ask that you please share this important piece of information with them. All 2023 eligible gifts will be our processing priority upon our return in January.

A reminder of the strict adherence of PCI (Payment Card Industry) policies for credit card donations. It is imperative that we are not collecting donor credit card information through voicemail or email as this is not a secure method of transmission. Your holiday voicemail message should include a reminder to donors to not leave credit card information on voicemail for security purposes. If a donor chooses not to donate via the online giving page, credit card numbers can be sent via Canada Post or faxed to the secure fax located in Finance & Budget (519-661-4182). If you receive credit card information over the phone or from a donor directly, the credit card number must be stored in a secure location until such time it can be delivered to Finance & Budget in the New Year for processing. Please note that CVV (3 digit security code) is required.

Securities:

Like Western, many brokers/banks enjoy holiday time out of the office, and so we may not receive security transaction confirmations as regularly during the holidays. But not to worry, any donations received before December 31st will be handled as 2023 donations regardless of broker, bank or Western office closures, and 2023 charitable tax receipts will be issued upon our return.

Please continue to email securities@uwo.ca with any inquiries or notifications related to security transfers over the holidays.

All December 2023 securities **received** into Western's brokerage accounts up to and including December 31st, will qualify for a 2023 receipt. Securities **received** January 1st or later will receive a 2024 receipt.

Below is the security process that should be followed even during office closures:

Western cannot initiate the security transfer on behalf of a donor. **This is a donor-broker transaction.** Security transfer authorization forms and securities remittal forms are available and accessible from the following site.

Please direct donors to: Advancement Operations:
https://advser.uwo.ca/advancement_services/donation_of_securities_forms.html

The Process for the Donor:

1. Forward the completed transfer form to your broker/investment advisor to initiate your electronic transfer of securities. **Western cannot initiate this transfer on your behalf.**
2. Forward a copy of the completed transfer form to Western (securities@uwo.ca) for our records. Unexpected and /or unidentified transfers make it difficult to issue appropriate tax receipts.
3. Please be advised that in normal circumstances, the value of the donation receipt will be based on the closing price of the security on the day the securities are received into Western's brokerage account, in accordance with our Board Policy and Canada Revenue Agency Regulations.

Thank you to everyone for your assistance during this busy time.

Wishing all a safe and happy holiday!

If you have any questions, do not hesitate to contact:

Janice Van Der Klugt
Manager, Alumni & Gift Services
Advancement Operations
Ext. 85321
519-661-2111
jburchil@uwo.ca

Or

donationrevenue@uwo.ca