



**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 2019.

All gifts, pledges and pledge payments must be submitted to Alumni & Gift Services by 4:30pm on Thursday, December 19th. This deadline will allow the Alumni & Gift Services Team the ability to ensure your submissions are processed before closing on December 20th. The last day to process any credit card donations is Thursday, December 19<sup>th</sup>. Any payments received after 4:30pm on the 19<sup>th</sup> may not be handled until our return in 2020, but will qualify for a 2019 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 can't guarantee a seamless processing experience for you.** The Remittal can be found on our website <http://www.advser.uwo.ca/information.htm> - please use Faculty Remittal located at the bottom of the page. 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://secure2.convio.net/uwo/donate.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 2019 electronic receipt.

**All envelopes must be retained and submitted with gifts received over the holidays. Envelopes bearing a postmark of December 31<sup>st</sup> or prior are eligible for a 2019 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 2019 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 Alumni & Gift Services (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 Alumni & Gift Services in the New Year for processing. Please note that CVV (3 digit security code) **should** now be collected from donors. You may recall this recent change to PCI policies

### **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 2019 donations regardless of broker, bank or Western office closures, and 2019 charitable tax receipts will be issued upon our return.

Tracy Loosemore on the Advancement Operations team is your contact for Securities. Tracy's contact information is 519-851-1687 or [tloosemo@uwo.ca](mailto:tloosemo@uwo.ca) should you have questions while our offices are closed.

All December 2019 securities **received** into Western's brokerage accounts up to and including December 31st, will qualify for a 2019 receipt. Securities **received** January 1st or later will receive a 2020 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:  
[http://www.advser.uwo.ca/advancement\\_services/donation\\_of\\_securities\\_forms.html](http://www.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 (Tracy Loosemore, [tloosemo@uwo.ca](mailto:tloosemo@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

Or

Tracy Loosemore  
Executive Director, Advancement Operations  
Ext. 85587  
519-661-2111 x85587  
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