



Balanced Pool

\$1,228,001.85
TOTAL BALANCE

Note: Asset allocation and investment performance for our new Balanced investment pool will be available in the fourth quarter investment overview.

Investment Performance

	Quarter	YTD	3 Years	5 Years	10 Years
Long-Term	(0.04%)	8.02%	10.18%	9.95%	8.94%
Balanced	-	-	-	-	-
Conservative	(0.01%)	3.48%	6.85%	-	-

*Net of Investment Fees

Non-Pooled Assets, Cash, and Other

\$27,449,752.23
TOTAL BALANCE

Total Invested

\$249,460,382.91
TOTAL BALANCE

Total Long-Term Pool	\$ 206,410,087.09	83%
Total Balanced Pool	\$1,228,001.85	< 1%
Total Conservative Pool	\$ 14,372,541.74	6%
Total Non-Pooled, Cash, Other	\$ 27,449,752.23	11%
Total Invested	\$ 249,460,382.91	100%



← Scan QR code or visit givecf.org/report to view our new 2020-21 annual report.

YEAR-END GIVING TIPS AND DEADLINES



As we approach the season of giving and the end of the calendar year, our staff is ready to make your year-end gifts and grantmaking as easy and impactful as possible. With this in mind, here are a few year-end giving tips and deadlines for 2021.

Changes for 2021

The Taxpayer Certainty and Disaster Tax Relief Act of 2020 extended temporary tax changes originally enacted by the CARES Act:

- Individuals who do not itemize their taxes, including married individuals filing separate returns, can claim a deduction on their 2021 return of up to \$300 for cash contributions made to qualifying nonprofits during 2021. The maximum deduction increased to \$600 for married individuals filing joint returns. Donations to donor advised funds do not qualify for this deduction.
- Individuals that itemize can deduct up to 100% of their adjusted gross income for cash contributions made to qualifying charitable organizations during the 2021 calendar year. Donations to donor advised funds, supporting organizations, and private foundations do not qualify for this deduction.

Donor Advised Funds and “Bundling”

A GWCF charitable fund is a great way to claim a tax deduction now and support your favorite nonprofits and charitable causes in the future. With a donor advised fund (DAF), donors can take their time deciding where and when their contributions go. And, in the meantime, their fund contribution can be invested, allowing them to give back even more over time. A charitable fund can also allow some donors to reach the itemizing threshold by “bundling” or pre-funding years of charitable giving in advance.

Establishing a charitable fund is quick and easy to set up with a gift of \$10,000 or more. Gifts can also be made with non-cash assets such as appreciated stock or mutual funds, which avoids capital gains tax on the sale of the stock.

Qualified Charitable Distributions

If you are 70 1/2 or older and not using your Required Minimum Distribution (RMD) for your living expenses, you can reduce your taxable income by using your RMD to contribute an IRA Qualified Charitable Distribution to a GWCF charitable fund (excluding donor advised funds).

Professional Advisors

Before making any significant gift to charity, we suggest you consult with your CPA, attorney, or other advisor to understand the impact on your taxes and estate. Our professional staff would be happy to work with you and your advisor to help maximize the impact of your year-end giving.

Deadlines for Year-End Giving

- Gifts/checks sent to GWCF must be postmarked no later than December 31, 2021.
- Credit card gifts can be made online at givecf.org/donate and must be made before midnight on December 31, 2021.
- Gifts of publicly- or privately-traded stock and other non-cash assets can be more complex, so be sure to get in touch with us soon to discuss.

GWCF Holiday Schedule

- Our offices will be closed on Friday, December 24 and Monday, December 27.
- We will be available all other weekdays, including Friday, December 31, to serve you during our regular business hours of 9:00 a.m. – 5:00 p.m.

If you have any questions or would like to set up an appointment, please call us at 863-683-3131.



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