BUCKINGHAM
BROWNE & NICHOLS
SCHOOL

Year-end giving deadlines

To make your gift count for 2026 for tax purposes, these are the dates by which we recommend beginning the process to ensure that your gift has time to clear. Your own advisor, broker, or account custodian may have different cutoffs, so please check with them as well.

Gifts of stock or other securities

START BY TUESDAY, DECEMBER 15

Electronic transfers take several business days, and the gift is dated when the shares are received in our account rather than when you request the transfer. Starting in mid-December leaves time for processing to be sure your gift arrives on time.

WHAT YOUR BROKER WILL NEED

DTC number: **0226** Account **Z49761885** Brokerage: **Fidelity Investments**
Click here for further details.

Transfers may arrive without donor names included, so please contact Advancement Services Manager Amie Margolis Haddad at 617-800-2730 or amargolishaddad@bbns.org when you initiate your stock gift so we can be looking for it to arrive and ensure that you receive appropriate credit.

Grants from a donor-advised fund

RECOMMEND BY TUESDAY, DECEMBER 15

Your DAF sponsor processes the grant and then mails a check or transfers the funds electronically, which takes time at the busiest point of their year. Recommend a grant early so that it reaches us by the end of the year.

WHAT YOUR SPONSOR WILL ASK FOR

Legal name **Buckingham Browne & Nichols School** EIN **04-2103751**

Mailing address **80 Gerry's Landing Road, Cambridge, MA 02138**

Searching by EIN avoids any mix-up with similarly named organizations.

You can also recommend your grant through this **link**.

Gifts from an IRA, if you are 70½ or older (Qualified Charitable Distribution)

START BY TUESDAY, DECEMBER 15

Most IRA custodians mail a paper check, and their internal cutoffs come earlier than people expect. This is the deadline we recommend starting the request, or earlier if possible. If you are 73 or older, a gift directly to BB&N from an IRA can also satisfy your required minimum distribution.

WHAT YOUR IRA CUSTODIAN WILL NEED

BUCKINGHAM
BROWNE & NICHOLS
SCHOOL

Ask them to send a qualified charitable distribution directly to

Buckingham Browne & Nichols School

80 Gerry's Landing Road, Cambridge, MA 02138

EIN **04-2103751**

Gifts from an IRA may arrive without donor names included, so please contact Amie Margolis Haddad at 617-800-2730 or amargolishaddad@bbns.orgd when you initiate a Qualified Charitable Distribution so we can be looking for it to arrive from the custodian and ensure that you receive appropriate credit.

Checks by mail

POSTMARKED BY THURSDAY, DECEMBER 31

A check postmarked December 31 counts for this year even if it reaches us in January.

MAIL TO
Advancement Office
Buckingham Browne & Nichols School
80 Gerry's Landing Road
Cambridge, MA 02138

Credit card and online gifts

BY 11:59 PM THURSDAY, DECEMBER 31
This is the latest you can give and still have it count for this year.
GIVE ONLINE

Gifts in your will, or from a retirement account or life insurance beneficiary

NO DEADLINE/Worth a conversation any time
Naming BB&N as a beneficiary of a retirement account or life insurance policy takes just one form from your provider and no attorney. Those forms decide where the account goes regardless of what a will says, so they are worth a look even if your plans are already in place.

WHO TO TALK TO
Linda Gallinaro, Director of Development, at 617-800-2721 or lgallinaro@bbns.org
If you have already included us, please let us know so we can thank you.

Learn more about Gift Planning options **here**.

This page is educational and is not legal or tax advice. Deadlines vary by broker, donor-advised fund sponsor, and IRA custodian. Please confirm timing and tax treatment with your own advisors.