

Charitable Giving Season FAQs

With charitable giving season in full swing, the Raymond James Charitable team typically experiences higher call and email volumes. To alleviate wait and response times, please use the below information to help answer some common questions. You can also reference the [Online Account User Guide](#) for assistance with accessing and navigating your account. If you need additional assistance, call or email us, and we'll get back to you as soon as we can. We appreciate your patience.

CONTRIBUTIONS

[What is the deadline to open or submit a new contribution to a DAF account?](#)

The 2025 deadline to open and/or fund a DAF at Raymond James Charitable is **December 12, 2025**. After that date, we will do our best to honor your request if time permits.

[How do I check the status of a new application?](#)

Once an application is submitted, you will receive an automated email confirming its submission. During busy season, it typically takes between 1 to 5 business days for the new application to be processed, after which you and any others linked to the account will receive a welcome email with information on how to access the account.

[I never received the email to eSign my application. What should I do next?](#)

If your Raymond James financial advisor completed the application on your behalf, request that they resend you the eSign email. If you completed the application yourself, contact Raymond James Charitable to have the email resent to the email address submitted on your application.

[When do checks need to be postmarked to count for this calendar year?](#)

The envelope addressed to Raymond James Charitable must be postmarked no later than **December 31, 2025**. Make checks payable to Raymond James Charitable, and in the memo line, indicate your DAF Fund ID#. Mail checks to P.O. Box 23559, St. Petersburg, FL 33742.

[How do I transfer assets from an existing Raymond James account to my DAF?](#)

Submit the [Contribution Form \(2783\)](#) to your financial advisor to upload to our Service Center portal.

[How do I transfer assets from an outside account to my DAF?](#)

Submit the [Gift of Outside Assets Form \(2788\)](#) to your financial advisor to upload to our Service Center portal. You will then need to initiate the transfer of the assets from the outside account to Raymond James Charitable, using the transfer instructions listed on the form. Note, if assets are transferred before the form is submitted, it will delay the funds being posted until the form is received.

[How do I check the status of submitted contribution forms?](#)

Ask your Raymond James advisor to search the Service Center portal to locate submitted forms and their current status.

[How quickly are securities sold/transferred?](#)

Once received by Raymond James Charitable, securities will be sold as soon as possible. Please note that mutual funds can take up to two weeks to be transferred and sold. Once sold, there is a one-day settlement period for all securities before the proceeds are moved into the DAF.

- If the securities are coming from a pledged account at Raymond James, financial advisors should ensure Customer Accounts has noted the release of the shares and/or cash on Scratchpad before submitting any paperwork. The assets will not be permitted to move until these notes are added.
- The "gift date" is the date the assets transfer from your account to Raymond James Charitable's (60137199 for securities; 8969L918 for cash) or the date the assets arrive in our account from the outside institution. The value of the gift of securities is based on the average price on the date the assets arrive in our account.

DISTRIBUTIONS / GRANTS

What is the deadline to request a grant to charity for receipt in 2025?

The 2025 deadline to submit a grant request from your DAF in order for it to be approved in 2025 is **December 1, 2025**. This ensures the team has enough time to review and approve any custom details during our busiest month. We highly encourage you to submit grants that qualify for auto-approval, as they go out in two business days. For a grant to be auto-approved, it must meet the following criteria:

- \$75,000 or less
- Directed to a public 501c3 charity in the US that is approved in RJC's database. *Note: Some religious institutions are not considered 501c3 organizations (but are still eligible to receive a grant from a DAF) and therefore will always be disqualified from auto-approval and require a review.*
- No custom comments in the Grant Purpose field or Special Instructions field
- DAF balance must have at least \$2,500 remaining after the grant distribution

If the grant meets the auto-approval criteria, you have until December 12, 2025, to submit the request. (Postal service delivery time is out of our control, but this will allow roughly two weeks before the last day of the year for the charity to physically receive the check.) If the charity has an urgent need after the deadline has passed, please email RJCGrants@raymondjames.com to request a rush review.

How do I get my charity approved early?

If your charity is not already approved in our database, follow the steps in the [Online Account User Guide](#) starting on page 3 to suggest it as a new charity. **You can still submit your grant request while we work to approve the charity.** You can request the grant with a future date, or, if you select "As soon as possible," the grant will be mailed as soon as the charity is approved.

How long does it take to send a check once a grant request is submitted?

It takes 1 to 5 business days for a grant to be approved in most cases. Once approved, the check is mailed the next business day.

Why is my grant taking longer to send?

Several factors could contribute to a delay in mailing a grant check. Examples include:

- DAF accounts typically maintain 5% in cash. If the submitted grant amount is more than the 5% held in cash, we need to initiate a trade to raise more cash and wait one day for the funds to settle before issuing the check.
- If a grant is for a charity new to our database, and they are not registered with the IRS (which can be common with religious organizations and government entities), we must collect information to confirm the charity is qualified to receive a grant from a DAF. It can take additional time to receive the required documentation from these new charities.

How do I find the status of a submitted grant request?

Log in to your Raymond James Charitable account, click the **Grant Activity** tab, and review the note under "Status" for the grant you requested. **Please note that processing time will be longer than usual at year-end.**

- **Entered:** We have received your grant request.
- **Approved:** The grant is approved, but the check has not yet been sent.
- **Posted:** The check has been mailed.

How do I know if the charity cashed the check for the grant I requested?

Log in to your Raymond James Charitable account, navigate to **Grants to Charity** and choose **Grant Activity**. Click on the Details link to the right of the grant you wish to view. Under "Processing History," there will be a "Cleared" date listed if the charity has cashed the check.

- **Created:** The date you entered the request.
- **Scheduled:** The date the check is scheduled to be mailed.
- **Issued:** The date Raymond James Charitable mailed the check.
- **Cleared:** The date the charity cashed the check.

RAYMOND JAMES Charitable

RAYMOND JAMES CHARITABLE ENDOWMENT FUND

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INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

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