



# Giving Season is here!

Your clients are ready to give back

This year-end giving checklist is a go-to resource from Ren for financial advisors, simplifying the process of aligning philanthropic goals with year-end financial strategies to maximize their clients' charitable giving.

## Quick year-end giving checklist:

- 1. Confirm goals by Thanksgiving.**  
Touch base with clients on their giving goals before Giving Tuesday, Dec. 3.
- 2. Review client assets for optimal gifts**  
Ren is uniquely qualified to help you identify the most tax-smart assets to give.
- 3. Open new DAF accounts by Dec. 16.**  
We recommend this cut-off date since some asset types take longer to process.  
*TIP: DAFs provide immediate tax benefits with flexible grant timing.*
- 4. Process all contributions by Dec. 31.**  
Deadline: Ensure all cash and asset contributions are completed by Dec. 31 to qualify for 2024 deductions.
- 5. Plan ahead for 2025**  
Set clients up for success next year with early planning.

## About Ren

You want to help your clients maximize their giving while growing your business - Ren is here to make that happen! We offer flexible, tax-smart solutions and tools that make it easy to include philanthropy in your practice. With Ren, you get more than just philanthropic services; you get a trusted partner dedicated to making generosity easy and impactful for everyone involved.

Contact our team of experts at [AskanExpert@reninc.com](mailto:AskanExpert@reninc.com) or visit [reninc.com](https://reninc.com) for more information about year-end giving or Ren.