

Making Year End Tax Plans

Thank you for considering a year-end gift to Trident Academy. We hope that you will find the information below helpful as you make plans for making a charitable gift, which may benefit your tax situation.

The information below is not intended as tax or legal advice. Please consult your attorney or financial professional.

Note: The last date to complete many gifts may be the last business day of the calendar year, rather than December 31st.

Making your gift by check

US Postal Service

- Date your check on or before Dec. 31, **and**
- Mail via U.S. Postal Service with postmark on or before Dec. 31.
- Gift checks mailed via U.S. Postal Service with postmark and check date on or before Dec. 31 will be counted for that calendar year regardless of when they are received at Trident Academy.

Other Delivery

- Date your check on or before Dec. 31, **and**
- Hand-deliver your check to the school
- Gift checks delivered by any method other than being mailed via U.S. Postal Service are effective as of date received at Trident Academy.

The address for mailing or hand-delivery of your check:

Advancement Office
Trident Academy
1455 Wakendaw Road
Mt. Pleasant, SC 29464

Making your gift by debit or credit card online

- Deadline is 11:59 p.m. (Eastern Standard Time) on Dec. 31.
- Make your gift using our [secure online giving form](#).

Making your gift with securities (stocks, bonds, mutual funds) via electronic securities transfer

- Your electronic transfer of securities from a brokerage account is complete when the securities have been received by an account owned by Trident Academy. Important: These gifts are not considered complete upon giving instructions to a broker.

- Your electronic transfer gift is counted for tax purposes only when it is complete (see above).
- Initiate your transfer early. It is wise to allow several weeks. While some transfers may be received within days of your instructions, longer delays are possible, especially at year-end.
- Deadline: Your electronic transfer must be received by 11:59 p.m., on the last business day of the calendar year.

Questions about making your year-end gift? Call the Advancement Office at 843-884-7046.