



Year-End Giving Statements for Your Donors

thanks that also satisfies the IRS An Extended Guide · No. 2076

————— **An Extended Guide · No. 2076** —————

Tech Made Simple. Service Made Personal.

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THE 60-SECOND VERSION

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1. The Whole Idea on One Page If you read only one page, read this. Here is the whole job as a short checklist. A year-end giving statement is the one letter your church or nonprofit sends each donor early in the new year. It thanks them, lists what they gave over the year, and includes a couple of specific lines the IRS wants so the donor can claim their deduction. It is part kindness, part paperwork, and it is simpler than it sounds.

- 1 Add up each donor's gifts for the full year from your records.
- 2 Write a warm thank-you letter with the donor's name and yearly total.
- 3 Include the required lines: your group's name, and whether anything was given in return.
- 4 Make one filled-in letter per donor, usually with a mail merge.
- 5 Send them out by the end of January, by mail or email.
- 6 Keep a copy of every statement with your records. **GOOD TO KNOW** The law hangs on one number: \$250. For any single gift of \$250 or more, the donor needs a written acknowledgment from you to deduct it. A clear year-end statement covers that beautifully. The rest of this guide walks through each piece gently — what the IRS actually requires, how to pull the totals, how to write the letter, and how to send it without a late-January scramble. Take it a page at a time. **WHY IT MATTERS** 2. Why This Letter Matters to Your Donors For most of your donors, this letter is the one time all year they

see their giving added up in one place. It tells them you noticed, you kept good records, and you are grateful. That alone makes people more likely to give again. But it also does a practical job: it is the paperwork they need to claim their gifts on their taxes. Without a proper acknowledgment, a donor who itemizes can lose the deduction on a large gift, even if they have a cancelled check. The IRS is strict about this for gifts of \$250 or more. Your statement is what protects your faithful givers from that unhappy surprise. It thanks the donor and shows you keep careful records. It gives them the one document the IRS wants for larger gifts. It quietly encourages the next year's giving.

GOOD TO KNOW

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It protects your group's good name as a careful, trustworthy steward.

Think of the statement as a thank-you note that happens to satisfy the tax rules, not a tax form that happens to say thanks. Lead with the gratitude, and the paperwork rides along.

THE \$250 RULE 3. The One Number the IRS Cares About The heart of the whole matter is a single threshold. The IRS says that for any single contribution of \$250 or more, a donor must have a written acknowledgment from the organization to claim the deduction. A bank record alone is not enough once a gift crosses that line. This is why your statement exists. Importantly, the \$250 is judged per gift, not per year. A donor who put \$20 in the plate every week never crosses \$250 on any single gift, even though the year totals over a thousand dollars. A donor who wrote one \$300 check did cross it. In practice, a good year-end statement lists everything and covers both cases cleanly. \$250 or more in a single gift triggers the written-acknowledgment requirement. The test is per gift, not per yearly total. A yearly statement that itemizes gifts can substantiate several large gifts at once. For gifts under \$250, a bank record is usually enough, but a statement is still a kindness.

GOOD TO KNOW The IRS's own guidance — Publication 1771 and Topic 506 — is the plain source for all of this. As rules can be updated, it is worth a look at [irs.gov](https://www.irs.gov) before each giving season.

WHAT IT MUST SAY 4. The Lines the Statement Has to Include A compliant acknowledgment is not fancy. It just has to contain a few specific things. Get these in, and the rest of the letter can be as warm and personal as you like. Leave one out, and a donor's deduction can be at risk, so this short checklist is worth following carefully.

Your organization's name. The amount of cash contributed (and a description of any non-cash gifts). A statement of whether you provided any goods or services in return for the gift. If you did provide something, a description and a good-faith estimate of its value.

WATCH OUT**5. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

If the gift was wholly a donation, a line saying 'no goods or services were provided.'

The 'goods or services' line is the one groups most often forget. For ordinary gifts where the donor got nothing back, you still must say so, in plain words like 'No goods or services were provided in exchange for these contributions.' That 'no goods or services' sentence feels odd to include when obviously nothing was exchanged, but the IRS wants it stated. Put it in every statement as a matter of habit, and you will never leave a donor exposed.

GOODS OR SERVICES 5. When the Donor Got Something Back Sometimes a donor does receive something for their gift — a banquet dinner, a tote bag, a raffle ticket, a concert seat. When that happens, only the part of the gift above the value of what they received is deductible, and your statement has to spell that out. This is called a 'quid pro quo' contribution, and it needs a little extra care. The fix is simply to describe what they got and give an honest estimate of its value. If someone paid \$100 for a fundraiser dinner worth \$40, the letter notes the \$40 value, so the donor knows \$60 is deductible. You are not setting the value to be stingy; you are being honest so the donor files correctly. List the gift amount and describe anything the donor received in return. Give a good-faith estimate of the value of what they received. Make clear that only the amount above that value is deductible. Token items of little value can often be ignored — but when in doubt, describe them.

GOOD TO KNOW For a 'quid pro quo' gift over \$75 where goods or services were provided, the IRS specifically requires a written disclosure. Fundraiser dinners and auction items are the common cases to watch.

GATHER RECORDS

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6. Getting Your Records in Order First Before you can write a single statement, you need one clean, trustworthy record of who gave what over the year. For many small groups this is the hardest part, not because it is complicated, but because the giving lives in several places: the offering counts, a few online gifts, a stock donation, some checks mailed in. The first job is to bring it all together. Collect every source: plate offerings, online giving, mailed checks, special gifts. Make sure each gift is tied to the right donor, by name or envelope number. Note the date and amount of each, and whether anything was given in return. Set aside anonymous or cash-in-the-plate gifts that cannot be tied to a donor. TIP The groups that sail through giving season are the ones that record gifts donor-by-donor all year, not the ones that reconstruct it in January. A little habit each week makes the year-end job painless. If your records are scattered, do not despair — you can still pull them together once, and then set up a simple habit so next year is easier. The next pages show both the tidy way and the catching-up way. FROM SOFTWARE 7. Pulling Totals From Giving Software If your group already uses giving or church-management software — the kind of app many congregations use for online donations — you are in luck. These tools almost always have a built-in 'year-end giving statement' or 'contribution statement' feature that totals each donor and can even include the required IRS wording for you. Look in your giving platform for 'statements,' 'contribution statements,' or 'year-end.' Most will generate one statement per donor automatically from the year's gifts. Many let you email them in a batch, or download them all to print. Check that the auto-generated wording includes the 'no goods or services' line. GOOD TO KNOW Online giving platforms commonly used by churches can produce these statements at the press of a button. If yours does, the hard part is already done — your job is mostly to check the wording and send them.

FROM A SPREADSHEET

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Even if the software does the heavy lifting, give one finished statement a careful read before sending the batch. Make sure the totals look right and the required lines are present. Software is a great help, but a human glance catches the odd surprise.

8. Doing It From a Simple Spreadsheet If you do not have giving software, a plain spreadsheet does the job just fine, and it is what a great many small groups use. The idea is one row per gift — donor, date, amount — which you can then total up per donor. It is humble, it is free, and it has kept the books for countless churches and clubs.

- 1 Make columns for donor name, date, amount, and a note for any gift given in return.
 - 2 Enter one row for each gift as it comes in, or all at once from your records.
 - 3 Use the spreadsheet's totaling feature to add up each donor's year.
 - 4 Sort by donor so each person's gifts sit together, ready to merge into a letter. WATCH OUT A free spreadsheet in a Google account or in the one on your computer is plenty. You do not need special software to do this correctly — you need one tidy list and a column of totals. Keep that spreadsheet safe and backed up, because it is now your official record of the year's giving. The chapter on records later in this guide covers keeping it protected and private.
- THE WARM PART 9. Writing a Letter People Want to Read Now the pleasant part. Around the required lines, you get to write a genuine thank-you. This is a chance to remind donors what their giving made possible over the year — the family helped, the roof repaired, the youth trip taken. A warm, specific letter does more for next year's giving than any appeal. Open with real gratitude, addressed to the donor by name. Name one or two concrete things their giving accomplished over the year. Then present the totals and the required lines, plainly. Close with warmth and a simple way to reach you with questions.

GOOD TO KNOW

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You do not need flowery language. A few honest sentences in the voice of your pastor, president, or treasurer land better than a stiff form letter. The goal is for the donor to feel seen and thanked, with the tax information tucked in as a helpful bonus. The required IRS lines and a heartfelt thank-you live comfortably in the same letter. You never have to choose between warm and compliant — a good statement is both at once. MAIL MERGE 10. Making One Letter Per Donor, the Easy Way Writing the letter once and then personalizing it for every donor is where a tool called 'mail merge' earns its keep. You write a single letter with blanks for the name and total, point it at your spreadsheet of donors, and the computer produces one finished, personalized letter for each — hundreds in a few minutes, with no copying and pasting.

- 1 Write your letter once, with placeholders where the name and total will go.
- 2 Connect it to your donor spreadsheet using your word processor's mail-merge feature.
- 3 Match the placeholders to the right columns — name to name, total to total.
- 4 Preview a few, then generate the whole set to print or to save as files.
- 5 Keep a copy of the full batch for your records. TIP Mail merge is the same trick people use for holiday-card labels. If the words 'mail merge' sound intimidating, that is all it is: one letter, many names, filled in automatically. Done once, a mail-merge setup can be reused every year — you just point it at the new year's totals. The first time takes a little setup; every year after is quick. BY MAIL OR EMAIL 11. Sending by Mail or by Email You can deliver statements on paper or by email, and both are perfectly acceptable to the IRS. Many groups do a mix: email for the donors who gave online or prefer it, printed letters for the folks who like something they can hold. Choose what fits your donors, and lean on whatever is less work for your volunteers. Printed and mailed: warm and familiar, good for older donors; costs postage and time.

GOOD TO KNOW

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Emailed as a PDF: fast and free, good for online givers; make sure addresses are current. A mix is fine — email those who prefer it, mail the rest. Either way, the same required wording must be in the statement. An emailed statement counts as a valid written acknowledgment. There is no need to mail paper if a donor is happy with email — a clear PDF attachment does the job and saves a stamp. Whichever way you send, keep your own copy. A saved file of every statement, or a printed set in a folder, is your proof that you acknowledged each gift properly. **THE DEADLINE 12.** When to Send Them Out Timing matters, because your donors need their statements before they file their taxes. The IRS rule is that the donor must have the acknowledgment in hand by the time they file, or by the filing deadline, whichever comes first. In practice, that means getting statements out in January, before people start preparing returns. Aim to send statements by the end of January. That gives donors their records well before the usual April filing deadline. Early senders look organized and give donors a head start. Late statements can cause a donor to lose a deduction — so do not let it slip. **WATCH OUT** A statement that arrives after a donor has already filed can be too late to help them. January is the target. Put it on the group's calendar as a firm yearly task so it never gets forgotten. Setting a standing January deadline — and starting the record-gathering in early January — keeps the whole thing calm. The groups that stress are the ones that start in April.

NON-CASH GIFTS**10. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

13. Handling Non-Cash and Stock Gifts Not every gift is a check or a card swipe. Someone may donate stock, a car, furniture for a rummage sale, or canned goods for a pantry.

These non-cash gifts are acknowledged a little differently: you describe what was given, but you do not state a dollar value — setting the value is the donor's job, not yours. For non-cash gifts, describe the item but do not assign it a dollar value. The donor is responsible for valuing their own non-cash gift. Larger non-cash gifts may require extra IRS forms the donor files themselves. Keep cash and non-cash gifts clearly separate on the statement. **GOOD TO KNOW** The rule 'you describe it, they value it' keeps your group out of the awkward business of appraising a used car or a box of books. Describe honestly, and leave the number to the donor and their tax preparer. If your group regularly takes larger non-cash gifts, it is worth a conversation with an accountant about the extra forms involved. For most small groups, the occasional donated item just needs an honest description. **KEEP IT PRIVATE** 14. Protecting Your Donors' Information A list of who gave what is sensitive information, and your donors trust you to guard it. Giving amounts are private; a leaked list can embarrass members and damage trust in the group. A little care in how you store and handle the records keeps that trust intact. Keep the giving records in one protected place, not on an open shared drive. Limit who can see donor totals to the treasurer and one or two trusted people. Never post or circulate a list of donors and amounts. When you email statements, send them one at a time, never as a group email that exposes addresses. **WATCH OUT** A mail merge that accidentally emails everyone on one line, or a spreadsheet left on a shared computer, can expose private giving. Handle the donor list with the same care you would a medical record.

CATCHING UP

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This is simply good stewardship. People give more freely when they trust that their generosity stays private, and protecting the list is part of honoring their gift. 15. If Your Records Are a Mess Perhaps you have inherited a shoebox of envelopes and a bank statement, and giving season is upon you. Take a breath; it is recoverable. The goal is to reconstruct, as honestly as you can, who gave what, from whatever records exist, and then set up a better habit so next year starts clean.

- 1 Start from the bank deposits and any online-giving reports you can find.
- 2 Match deposits to donors using envelopes, check images, or memory where honest.
- 3 Record what you can confirm; leave out what you genuinely cannot tie to a donor.
- 4 Produce statements from what you reconstructed, and note it was your best careful effort.
- 5 Set up a simple weekly recording habit so next year is not a reconstruction. TIP It is better to send an honest statement built from the records you have than to send nothing. Do your careful best in a catch-up year, and fix the system so next year is easy. Every group that now runs a tidy giving season started somewhere. One hard catch-up season, followed by a small weekly habit, turns the shoebox into a system you can trust. A YEARLY SYSTEM 16. Setting Up a System You Keep The secret to painless giving statements is to make the record-keeping a small, steady habit rather than a yearly cliff. When each gift is recorded as it comes in, January becomes a matter of pressing a button or sorting a tidy list, not rebuilding a year from scraps. Record each gift donor-by-donor the week it arrives, not in a January rush. Reconcile your giving records against the bank monthly, so errors surface early. Keep the 'no goods or services' wording saved, ready to drop into each year's letter. Keep your mail-merge letter from year to year, updating only the totals and the year.

GOOD TO KNOW

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A group that records giving weekly and reconciles monthly can produce a full set of accurate statements in an afternoon. The whole secret is steady habit, not fancy tools. Build the habit once, hand it down to each new treasurer with a written cheat sheet, and your giving statements become a quiet, reliable yearly rhythm instead of a dreaded chore.

VOLUNTEER TREASURER 17. A Word for the Volunteer Treasurer In most small churches and clubs, this whole job falls to a volunteer treasurer who did not sign up to become a tax expert. If that is you, be kind to yourself. You do not need to know everything; you need to follow a simple, correct routine and keep good records. This guide is that routine. You are not expected to be an accountant — a careful routine is enough. Lean on your giving software's built-in statements where you can. When a situation is genuinely unusual, it is fine to ask a CPA a one-off question. Hand the next treasurer written notes, so the knowledge does not leave with you.

GOOD TO KNOW The treasurer role turns over often in volunteer groups. A written one-page cheat sheet — where the records live, how statements get made, when they go out — is a gift to whoever comes next. You are doing real, valued service that protects both the group and its donors. Follow the routine, keep the records, pass on the notes, and you are doing it right.

WHO GETS ONE 18. Which Donors Should Receive a Statement A fair question is whether you must send a statement to everyone or only to the larger givers. Strictly, the written-acknowledgment requirement bites for single gifts of \$250 or more. But the kind and simple practice most groups follow is to send a statement to every donor you can identify, large or small. It costs little and it treats everyone the same. The legal trigger is a single gift of \$250 or more. The kind practice is to send a statement to every identifiable donor. Sending to all avoids awkward questions about who 'qualified' for one.

GOOD TO KNOW

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Donors below the threshold still appreciate the thank-you and the record.

Sending a statement to every donor, not just the big ones, is simpler to administer and warmer to receive. The small extra effort of including everyone is usually worth it. Where a group is very large and resources are tight, focusing on donors who crossed \$250 is defensible. For most small churches and clubs, though, everyone-gets-one is the gentler and easier rule.

ENVELOPE NUMBERS 19. Offering Envelopes and Donor Numbers Many churches hand out numbered offering envelopes, and these are a quiet hero of accurate giving records. The number ties a gift to a donor without anyone having to read a name off a check or remember who put what in the plate. If your group uses them, they make the year-end job far easier. Each donor gets a number; their envelopes carry it all year. Counters record the number and amount, not the name, which also protects privacy. At year-end, the number list ties each total back to the right donor. Keep the number-to-name key in the same protected place as the giving records. **TIP** If your group does not use envelopes and struggles to tie plate cash to donors, a simple numbered-envelope system is an inexpensive fix that pays off every single giving season. Envelopes are not the only way — online giving already carries the donor's name — but for cash and check givers, they remain one of the simplest tools for clean records.

HOUSEHOLDS 20. Couples, Households and Joint Statements Married couples and households often give as one, and they usually want a single combined statement rather than two. A little thought about how you group donors keeps this tidy and avoids sending a husband and wife two half-statements that neither can use cleanly at tax time. Decide whether a couple's gifts are tracked together or separately in your records. Most households prefer one combined statement in both names.

GOOD TO KNOW

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Be consistent, so the same household is grouped the same way each year.

Ask if you are unsure how a particular household wants to be listed. How a household files its taxes is their business; your job is simply to total their gifts accurately and name them the way they prefer. When in doubt, a quick ask settles it. Getting the household grouping right once, and keeping it consistent, saves confusion for both your treasurer and the donors every year after.

DESIGNATED GIFTS 21. Building Funds and Designated Giving Donors often give to a specific purpose — a building fund, a mission trip, a memorial. These designated gifts are generally still deductible, and they belong on the statement, but it helps everyone to show them clearly so the donor and the group both know where the money was meant to go. List designated gifts alongside general ones, noting their purpose where helpful. A gift earmarked for a specific approved fund is generally still deductible. A gift earmarked for a specific individual usually is not deductible — be careful here. Keep the fund labels consistent between your books and the statement.

WATCH OUT A gift a donor directs to a specific person — 'for the Smith family' — is often not tax-deductible, even though it is generous. When a designation names an individual, flag it and check with a CPA before acknowledging it as deductible. Most designated giving is straightforward and deductible. The one to watch is the gift aimed at a particular person rather than a fund — a kind act, but a different thing in the eyes of the tax rules.

RECONCILING 22. Matching Online Giving to the Plate A donor's giving often arrives by several roads at once: some in the plate, some by a monthly online gift, some by a check mailed in. The year-end job is to bring all of those together under the one donor, so their statement shows a true total and nothing is counted twice or missed.

TIP**15. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Pull a full-year report from your online giving platform, donor by donor.

Combine it with the plate and check records for the same donors. Watch for gifts recorded in two places, and count each only once. Reconcile the grand total against your bank deposits as a sanity check. The bank deposits are your truth test. When the sum of everyone's statements lines up with what actually hit the bank over the year, you know your totals are honest. This matching is where most year-end errors hide. A patient pass to combine the roads of giving — and a check against the bank — catches them before a donor ever sees a wrong number. CORRECTIONS 23. When a Donor Says the Total Is Wrong Now and then a donor will call to say their statement looks low or high. Handle it calmly and kindly; it is usually an honest records question, not an accusation. Having clean, dated records makes these conversations short and keeps everyone's trust intact.

- 1** Thank them for checking and ask which gifts they think are missing.
- 2** Compare their memory against your dated records, gift by gift.
- 3** If you find an error, issue a corrected statement promptly.
- 4** If the records are right, walk them through the dates gently so they can see it too.
- 5** Keep a note of the conversation and any correction made. **GOOD TO KNOW** Most 'the total is wrong' calls turn out to be a gift that landed in a different month than the donor remembered, or a check that cleared late. Dated records resolve them quickly. Treating a correction request as a chance to show careful stewardship — rather than a challenge — turns a potentially awkward call into a small act of trust-building.

MORE OFTEN

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24. Quarterly Statements, If You Like Nothing says the statement has to be yearly. Some groups send a shorter statement every quarter, which spreads the work out, keeps donors informed, and gives people a chance to catch a records problem early rather than discovering it the following January. Quarterly statements spread the workload across the year. They let donors catch a missing gift while memories are fresh. They keep giving gently top-of-mind without feeling like an appeal. You still send or confirm a full-year statement for tax purposes. **GOOD TO KNOW** If your giving software can send statements at the press of a button, quarterly becomes nearly free in effort. For hand-built statements, yearly is usually plenty. Quarterly is a nice touch for groups that can manage it, but it is not required. A single accurate year-end statement meets every need the IRS and your donors have. **FOR CHURCHES** 25. A Note for Churches Churches sit in a slightly special spot. They are generally treated as tax-exempt without having to file for recognition the way other charities do, and gifts to them are deductible. But the same acknowledgment rules still apply: a member who gives \$250 or more at once still needs that written statement to deduct it. Gifts to a church are generally deductible, like gifts to other charities. The \$250 written-acknowledgment rule applies to church gifts just the same. If a member asks for proof of your tax-exempt status, you can usually provide it on request. For unusual situations, a church-savvy CPA is worth the one-time call. **GOOD TO KNOW** Being a church does not change the donor's paperwork. Your faithful weekly givers whose single gifts stay under \$250 are fine with bank records, but anyone who gave \$250 or more at once needs your statement. The practical upshot for a church is the same as for any group: keep clean donor records, send clear year-end statements with the required lines, and your members are well looked

BACK IT UP**17. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech***after at tax time.*

26. Backing Up Your Giving Records Your year's giving records are precious — they are both your statements' source and a legal record. Losing them to a dead computer or a lost password would be a genuine problem. A simple backup habit means that can never happen, and it takes only a few minutes.

- 1 Keep the giving spreadsheet or software data backed up in a second safe place.
 - 2 Export a copy of the year's records after you finish the statements.
 - 3 Store the finished statements themselves, printed or as saved files.
 - 4 Record where everything lives, so the next treasurer can find it. **TIP** The finished statements, a backup of the source records, and a note of where they live: three small things that let your group recover instantly if a computer ever dies. You will likely never need the backup, but giving records are exactly the kind of thing you do not want to rebuild from scratch. A few minutes of care protects years of faithful record-keeping.
- PRESENTING IT 27. A Short Cover Note With the Statement** A statement lands better with a sentence or two of framing, whether at the top of the letter or in the email that carries it. A brief, warm cover note tells the donor what they are looking at, why it matters, and that you are there if they have questions. It turns a bare table of numbers into a thank-you. Say plainly what the document is — 'your giving statement for the year.' Thank them once more, and point to what their giving made possible. Tell them to keep it with their tax papers if they itemize. Give a name and number to call with any question. **TIP** One friendly sentence — 'Here is your giving statement for the year, with our heartfelt thanks; please keep it with your tax records' — is all the cover note most donors need.

YEAR-ROUND THANKS

18. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

The cover note is small, but it is the difference between a cold form and a warm acknowledgment. It costs nothing and makes the whole thing feel like the thank-you it is meant to be.

28. Thanking Donors Beyond the Statement The year-end statement is one moment of gratitude, but the groups whose giving stays strong are the ones that say thank you more than once a year. The statement handles the paperwork; a few other small touches keep donors feeling part of something, which is what keeps them giving. A prompt thank-you for a first-time or unusually large gift goes a long way. An occasional note on what the giving accomplished keeps donors connected. A yearly report, even a one-page one, shows good stewardship. The statement itself is a chance to thank, not just to tally.

GOOD TO KNOW Donors who feel thanked and informed give more freely and longer. The statement is the required thank-you; the extra touches through the year are what build lasting generosity. None of this has to be elaborate. A little genuine, regular gratitude — with the year-end statement as its anchor — does more for a group's giving than any polished campaign.

MISTAKES 29. The Mistakes to Avoid Most problems with giving statements come from a short list of avoidable slips. Knowing them in advance is the easiest way to keep your donors protected and your group's records clean. Forgetting the 'no goods or services' line on ordinary gifts. Putting a dollar value on a non-cash gift, which is the donor's job, not yours. Sending statements too late, after donors have already filed. Exposing the donor list by emailing everyone on one line. Rebuilding the whole year in January instead of recording gifts as they arrive.

TIP**19. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Run a simple test on a finished statement: does it name your group, list the gifts, and state clearly whether anything was given in return? If yes, you have the essentials right. None of these is hard to avoid once you know them. A correct template, a steady habit, and a January deadline head off nearly every trouble before it starts. **COMMON QUESTIONS 30.** Answers to Common Questions A few questions come up every giving season. Here are short, honest answers to the ones heard most, with the reminder that the IRS's own pages are the final word. 'Do we have to send statements?' For gifts of \$250 or more, donors need your acknowledgment to deduct them. 'Can we just email them?' Yes — an emailed statement is a valid acknowledgment. 'Do we value donated items?' No — you describe non-cash gifts; the donor sets the value. 'What about the \$5 in the plate?' Small untraceable cash gifts generally need no statement. 'When must they go out?' By the time donors file, so aim for the end of January. **GOOD TO KNOW** When a question is genuinely unusual — a big stock gift, a complex fundraiser — a single phone call to a CPA is money well spent. For the everyday cases, the answers above cover it. If a question here leaves you unsure, that is normal. The everyday statement is simple; the rare odd case is worth a quick expert check. **Honest and careful beats guessing. DO IT WELL 31.** Getting Your Statements Out You now know the whole shape of it: gather the records, total every donor, write a warm letter with the required lines, merge it for everyone, and send it by the end of January, keeping a copy. It is a yearly rhythm that gets easier each time, and your donors will thank you for it.

- 1 Early January: pull together the full year's gifts, donor by donor.

GOOD TO KNOW

20. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

- 1 Total each donor and sort your list.
- 2 Write the thank-you letter with the required IRS lines, including 'no goods or services.'
- 3 Mail-merge one statement per donor; preview a few before sending the batch.
- 4 Send by the end of January, keep a copy, and note the routine for next year. You do not have to remember all of it. You just have to remember you can call. Friendly, in-home help, and I come to you — (330) 200-8042. A clear, kind giving statement is one of the simplest ways a group honors its donors. Set the routine, send it on time, and the whole thing becomes a quiet yearly act of gratitude. BILL'S HERE TO HELP 32. You Don't Have to Sort This Out Alone If the technical side of this feels like more than you want to take on — setting up a clean giving spreadsheet, getting your software to produce statements, building a mail merge so one letter becomes two hundred — that is exactly the kind of thing I help local groups with. I am glad to sit down with your treasurer and get the system working. I can help you organize the records, set up a reusable mail-merge letter, get your giving software's statement feature working, and show your treasurer how to run it each year. Then I leave you with it working and a simple written cheat sheet, so the group owns it for good. For the tax rules themselves, I will always point you to the IRS pages or a CPA — that is their lane, not mine. GOOD TO KNOW Friendly, in-home and in-person tech help for people and groups around Portage County. I come to you. If you are not happy with a visit, I will make it right. (330) 200-8042. Whether you set it up yourself with this guide or give me a call, the goal is the same: accurate, warm statements out the door by the end of January, and a system simple enough to keep for years.

CHEAT SHEET**21. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Everyday Cheat Sheet Keep this page handy. It points you straight to what to do for each task. I want to... Do this Know the number A single gift of \$250+ needs a written acknowledgment to be deducted Include the basics Your group's name, the amount, and whether anything was given in return Say the magic line 'No goods or services were provided' on ordinary donations Gather records One tidy list — donor, date, amount — pulled from every source Total each donor Use giving software or a simple spreadsheet to add up the year Merge the letters Write one warm letter; mail-merge fills in each name and total Send by January 31 Mail or email a PDF — both count; keep a copy of each Keep it private Guard the donor list; email statements one at a time Get help Call Bill: (330) 200-8042

HOW I CAN HELP**22. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Your Visit — and My Promise In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included. Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo). GOOD TO KNOW My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated. Call or text (330) 200-8042 · Book a visit: billshometech.com/book · bill@billshometech.com This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.

AT A GLANCE

A Picture to Follow Along

What a Giving Statement Does

One yearly letter that thanks the donor and helps them at tax time.



Illustration — a schematic. Set-up screens differ; each takes only a few minutes.

AT A GLANCE

A Second Look

From Records to Mailbox

Four calm steps, once a year, early in the new year.

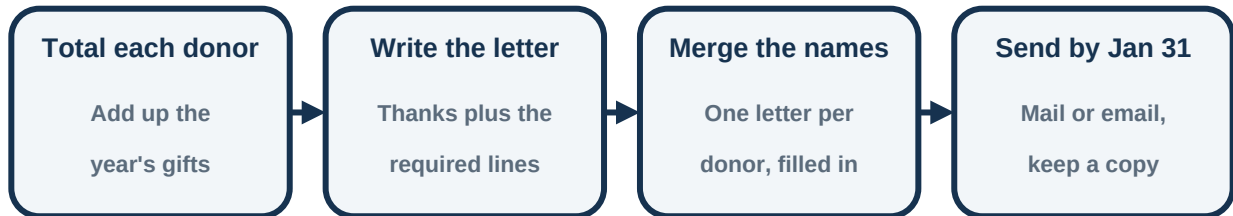


Illustration — a schematic. The order is a suggestion; do one box at a time.

A schematic of the plan — company steps vary; the order does not have to.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: **billshometech.com/book** · **bill@billshometech.com**

This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.