

SAMPLE YEAR-END GIVING COVER LETTER

December [DATE], 2020

Dear Friend, [FEEL FREE TO PERSONALIZE]

This time of year is often called the "giving season" because so many people make charitable gifts between Thanksgiving and New Year's Eve. In fact, many charitable organizations count on year-end gifts for as much as 40% of total yearly support!

Please know we value and appreciate your interest in [ORGANIZATION NAME]. Thoughtful gifts from people like you play a vitally important role in helping us [DESCRIBE YOUR MISSION HERE]. As we approach the final weeks of 2020, we hope you will consider a special charitable gift during this unusual year.

This year, your gifts can go further. The *CARES Act* allows an itemized charitable deduction in 2020 up to 100% of adjusted gross income for cash gifts to qualified charities. The IRS will instruct you on how to elect this provision if your gifts and other deductions allow you to itemize instead of taking the standard deduction.

If you take the standard deduction, the law allows a \$300 above-the-line (non-itemized) charitable deduction for cash gifts to qualified charities.

Please contact us if you need additional information or have any questions. You can make a gift online at [WEB ADDRESS]. Wishing you and yours the best of the season.

Thank you,

NAME
TITLE

SAMPLE YEAR-END GIVING ARTICLE/WEB COPY

Give This Year-End and Receive Tax Savings Next Year

As the year draws to a close, now is an ideal time to complete gift pledges and make special gifts to **[ORGANIZATION]**. By completing charitable gifts by Dec. 31, you can be eligible for additional tax savings next April.

During the final weeks of 2020, make time to discuss your charitable plans with your family and financial advisors. Everyone's circumstances are different, making it important to structure gifts in ways that are most beneficial for you. Don't forget the special provisions for 2020 enacted by the *CARES Act*. These provisions are set to expire Dec. 31.

Please know we deeply appreciate every gift—and every donor. Do not hesitate to contact us if you have any questions about a gift you are considering. If you would like to make a gift now, **[DONATE NOW-LIVE LINK TO WEBSITE]** or mail your contribution to:

Name of Charity

Address

City

State

ZIP Code

SAMPLE YEAR-END GIVING POSTSCRIPT LANGUAGE FOR DONOR COMMUNICATIONS

Optional P.S. #1

P.S. Those considering larger gifts may be surprised to learn about the special benefits associated with gifts of securities and other noncash items. Contact us for more information or assistance.

Optional P.S. #2

P.S. Consider making a gift to **[ORGANIZATION]** as part of your estate plan.

Optional P.S. #3

P.S. If you are 70½ or older, check with us or your advisors to see if charitable gifts can effectively reduce or eliminate taxes on IRA distributions through a QCD directly to a qualified charity.

Optional P.S. #4

P.S. This year, your gifts can go further with the *CARES Act*, which is set to expire Dec. 31. There are special incentives for cash contributions by those who itemize deductions or take the standard deduction. Contact us to learn more.

SAMPLE YEAR-END GIVING EMAIL

Suggested Subject Lines

- 1. Season's Greetings**
- 2. 'Tis the Season for Giving**
- 3. Giving Before Dec. 31**
- 4. Giving Thanks at Year-End**
- 5. A Year-End Reminder**
- 6. The Benefits of Year-End Giving**
- 7. Thank You for Your Support**
- 8. Make 2020 Less Taxing**

Copy

As you consider which of your favorite charities you will support this December, please know we would be honored to be among those on your list. We are happy to offer the attached information designed to help you make the most of your year-end giving plans. Every gift is sincerely appreciated.

Your gifts can be made online at [\[WEB ADDRESS\]](#) or mailed to:

Name of Organization

Address

City, State, ZIP

(Add optional signature with a specific link to your online giving portal)

SAMPLE CHARITABLE IRA DONOR EMAIL

Gifts From Your IRA

Dear **Friend**,

If you have an IRA and are 70½ or older, you may choose to give from your retirement account.

Though the *CARES Act* suspended required minimum distributions from IRAs for 2020, you can still make tax-free transfers to support

[ORGANIZATION].

Contact your IRA administrator for forms necessary to make your gift. It may be possible to write a check directly from your IRA account. Please contact **[ORGANIZATION]** if you have any questions about making a tax-favored gift directly from your IRA.

For more information about estate and gift planning, please contact me. I'll be happy to talk with you.

Cordially,

NAME

TITLE

CONTACT INFO