



# Year-End **Fundraising Toolkit**

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Commentary, advice and communication materials  
from Sharpe Group

# Why This Is the Most Generous Time of the Year

It's no secret most charitable organizations receive a large percentage of their gifts in the final three months of the year, with the most occurring between Thanksgiving and Dec. 31. But simply knowing year-end is a popular time to give is not enough to ensure your organization gets its share. Understanding **how** and **why** people choose to give at this time can help you make the most of the season.

Donors give at year-end for a variety of reasons, some practical and some emotional. As the final day of the calendar year, Dec. 31 presents donors with a natural and definite deadline for tax planning purposes. If a gift is made by that date, the donor may benefit from a tax deduction the following April. If the gift is postponed just one day and is made instead on Jan. 1, the tax benefits will be delayed a full year. Although donors rarely cite the charitable deduction as the primary motivation for making a gift, it nonetheless provides an important incentive for many of America's most generous donors. In fact, Giving USA estimates that the majority of individual gifts are made by taxpayers who itemize deductions from taxable income. And after all, who would not want to decrease their income tax bill or increase their refund for next April 15?



The period between Thanksgiving and New Year's Eve is also an emotional time for most of us. The nature of the holidays and increased time with family and friends create an environment that is conducive to giving and sharing. Many choose this time to share their good fortune with others, including those nonprofits whose missions they support.

# Important Dates for **Year-End Marketing**



**National Estate Planning Awareness Week:** Oct. 17-23, 2022. This week offers an opportunity to partner with estate planners in your area to educate your donors about charitable bequests and other planned gifts that offer income and other financial benefits. Visit [naepc.org/events/awareness\\_campaigns](https://naepc.org/events/awareness_campaigns).

**National Philanthropy Day:** Nov. 15, 2022. While your supporters should be recognized throughout the year, this day has been set aside to shine the spotlight on volunteers and donors. For more information, visit the Association of Fundraising Professionals' (AFP) site for this event at [afpglobal.org/NPDLove](https://afpglobal.org/NPDLove).

**#GivingTuesday:** Nov. 29, 2022. Coming shortly after Black Friday and Cyber Monday, GivingTuesday encourages donors to add their favorite charities to their gift list. Visit [givingtuesday.org](https://givingtuesday.org).

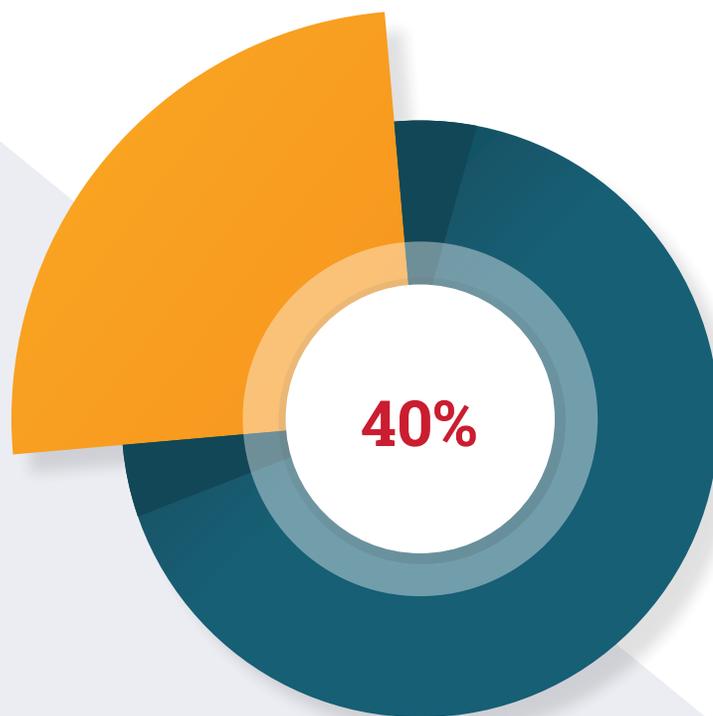
**Year-End:** Dec. 31, 2022. The charitable giving deadline for the roughly 20 million taxpayers who itemize charitable gifts is traditionally one of the most popular days of the year for online and direct mail gifts.

# Year-End Marketing Communications Resources

Marketing for year-end gifts seems to begin earlier each year, yet December remains the strongest month for year-end giving. Online giving peaks in December, with Dec. 31 being the most popular day of the year for online contributions. A study by Network for Good shows that donors give 52% more in December than they do in other months. Most gifts of appreciated stock are received in December, and charitable IRA contributions also peak late in the year, when those age 72 or older are considering required minimum distributions (RMDs) for the year. In addition, gifts sent by mail surge in December, and many checks mailed in late December often continue to be received well into January.

**Do not wait until the last minute to encourage year-end gifts.** Take advantage of the fall giving season that extends from September until the end of the year.

**Many nonprofits receive between 30% and 40% of their yearly gift total during the final six to eight weeks of the year.**



# SAMPLE YEAR-END Letter

Dear Friend,

This time of the 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 past support and 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 2022, we hope you will consider renewing your support with a charitable gift to help us continue to achieve our goals.

Please contact us if you need additional information or have any questions. You can make a gift online at **[WEB ADDRESS]** or simply return your gift by mail in the enclosed envelope.

Wishing you and yours the best of the season.

Thank you,

**NAME**

**TITLE**

# SAMPLE YEAR-END Giving Response Cards

## SAMPLE YEAR-END GIVING RESPONSE CARD OPTION #1

Enclosed is my gift of:

\$25  \$100  \$250  \$500

Other \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Phone/Email (optional) \_\_\_\_\_

Please call **[YOUR PHONE]** or email **[YOUREMAIL@YOURORG.ORG]** about:

A gift of stock.

A QCD.

Other, real estate, etc.

## SAMPLE YEAR-END GIVING RESPONSE CARD OPTION #2

Please send me your complimentary booklet on smart ways to give in 2022.

Enclosed is my gift/pledge payment.

Please send me information on gifts of:

Stocks or bonds.

Name \_\_\_\_\_

QCDs.

Address \_\_\_\_\_

Donor advised funds.

City, State, ZIP \_\_\_\_\_

Beneficiary designations.

Phone (optional) \_\_\_\_\_

Real estate.

Email (optional) \_\_\_\_\_

Other \_\_\_\_\_

# 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 2022, 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 that gifts of appreciated stocks or bonds or, perhaps, distributions from retirement plans may be your most attractive option. It can be advantageous to "bunch" or combine gifts into a single year, allowing taxpayers to alternate between taking the standard deduction and itemizing.

Please know that we deeply appreciate every gift—and every donor. Do not hesitate to check with 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 Organization**

**Address**

**City, State, ZIP**

# SAMPLE YEAR-END GIVING Email

## Suggested Subject Lines

1. Season's Greetings
2. 'Tis the Season for Giving
3. Giving Before December 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

## Copy

As you consider which of your favorite charities you will support this December, please know that 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 [website@domain.org](http://website@domain.org) or mailed to:

## Name of Organization

### Address

### City, State, ZIP

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

# Sample Qualified Charitable Distribution (QCD) Donor Letter

**DATE**

**NAME**

**ADDRESS**

**CITY, ST, ZIP**

Don't Let the IRS Tax Your IRA

Dear **XXXXX**,

Those with an IRA have long been required to withdraw a certain amount (called the required minimum distribution) based on their age. The law requires this withdrawal regardless of need. If you have done this in the past, you know what a taxing experience this can be.

You may be pleased to know that you have a choice that will allow you to help **[ORGANIZATION]** in a special way. It is now possible to make charitable gifts directly from your IRA through a qualified charitable distribution. By doing this, you will not pay additional federal income taxes, and you can satisfy all or part of your required minimum distribution withdrawal. IRA QCDs may be an attractive option for those over 70½.

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**

# Your Marketing **Calendar**

/09  
**SEP**  
2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
4	5 International Day of Charity	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25 Rosh Hashanah begins	26	27	28	29	30	1
2	3	4	5	6	7	8

## Planning Notes:

- Review year-end giving plans for the remainder of the year.
- Order year-end giving materials.
- Update web content.
- Consider updating donor data such as address, age, wealth, income, etc., for segmentation and marketing purposes.
- Consider special gift promotions: QCDs, gifts of stock or other gift plans.
- Fill in major events and appeals already scheduled for the fall. Make a note if a year-end giving promotion may be included (added to letters, emails, articles, websites and other communications).
- Consider special plans for special people: the top 10, 100, 300 and 500, or the category that fits your donor base, such as high-net-worth, affluent donors with six-figure incomes and seven-figure minimum net worth.

# Your Marketing **Calendar**

/10  
**OCT**  
2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	1
2	3	4	5 Yom Kippur begins	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
<b>National Estate Planning Awareness Week is October 17-23</b>						
23	24 Diwali	25	26	27	28	29
30	31	1	2	3	4	5

## Planning Notes:

- Review and revise year-end marketing materials, making sure language is updated for special 2022 provisions.
- Consider special estate planning communications and education for National Estate Planning Awareness Week.
- Continue web content.
- Include year-end giving postscript on digital and print appeals.
- Mark group or individual meetings.
- Follow up with additional information.
- Plan targeted mailings with year-end appeals.

# Your Marketing **Calendar**

/11  
**NOV**  
2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4 Order year-end publications	5
6	7	8	9	10	11	12
13	14	15 National Philanthropy Day	16	17	18	19
20	21	22	23	24 Thanksgiving	25	26
27	28	29 #Giving Tuesday	30	1	2	3
4	5	6	7	8	9	10

## Planning Notes:

- Order year-end publications by Nov. 4 in order to send to donors before Thanksgiving and for use in December. Visit [sharpegroup.org/year-end-giving-communications-2022](https://sharpegroup.org/year-end-giving-communications-2022) to get started.
- Plan communications around National Philanthropy Day and #GivingTuesday.
- Continue web copy. Include year-end giving postscript on digital and print appeals.
- Schedule digital communications and consider preparing a series of fundraising emails to form a digital fundraising campaign starting in November, with the final message on or before Dec. 31 with a link to your online giving portal.

# Your Marketing **Calendar**

/12  
**DEC**  
2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	1	2	3
4	5 International Volunteer Day	6	7	8	9	10
11	12	13	14	15	16	17
18 Chanukah begins	19	20	21	22	23	24 Christmas Eve
25 Christmas Day	26 Kwanzaa begins	27	28	29	30	31
1	2	3	4	5	6	7

## Planning Notes:

- Transition from #GivingTuesday messaging to “Give by Dec. 31” messaging.
- Send final postcards or notes.
- Schedule final emails to all donors with email addresses. Include information about whether your organization will be available to help with gifts on Dec. 31.
- Plan “thank-you” communications, digital and print.

# Marketing Materials

## Year-End Giving Publications

Sharpe Group's 2022 Year-End Giving Brochures are a convenient and cost-effective way to remind your donors of the advantages of certain giving options before the end of the tax year. Our brochures and booklet highlight the benefits associated with the various gifts in light of current economic conditions and recent tax law changes.

Use our online platform to create and order printed year-end communications targeted to your donors.

- **Select** a brochure from the five available **titles** (The Benefits of Giving in 2022, Giving at Year-End 2022, The Gift That Comes From Giving, Seasons of Giving and The Happiness That Comes From Giving). Or choose our **new booklet**, the "2022 Year-End Giving Guide."
- **Choose** an **accent color** and **cover image** from the provided selections, like the ones pictured, or **upload** your **own image**.
- **Add** your **full-color logo** and **contact information** to the front and back panels to create a publication branded to your organization.

If you prefer something more unique, ask your consultant about creating a custom year-end communications piece.

Visit [sharpegroup.org/year-end-giving-communications-2022](https://sharpegroup.org/year-end-giving-communications-2022) to get started today!



### Personalized Brochures: The Benefits of Giving in 2022

"The Benefits of Giving in 2022" highlights some of the best ways a donor can give to your organization to achieve their personal and philanthropic goals in light of tax laws for this year. This brochure details the benefits of cash and noncash gifts as well as gifts from retirement plans, insurance policies and more.

# Marketing Materials

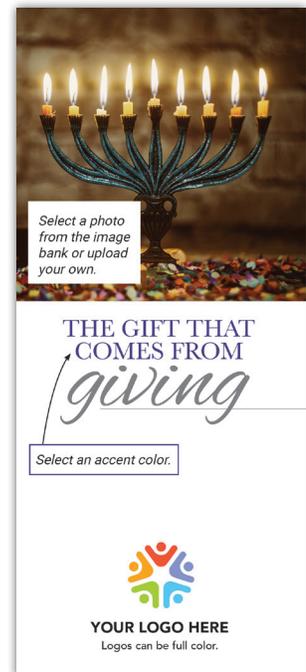


## Giving at Year-End

“Giving at Year-End” offers concise suggestions for giving before the end of the year. It highlights gift vehicles that take advantage of tax savings while allowing the donor to make gifts to the missions they support.

## The Gift That Comes From Giving

The content for the brochure “The Gift That Comes From Giving” was written with faith-based organizations in mind. It highlights ways to give before the end of the year that enable donors to support organizations that share their faith and values.



## Seasons of Giving

“Seasons of Giving” offers an outlook of hope after challenging times and reminds donors of the importance of being prepared for the future, including planning their charitable gifts to help them meet personal and philanthropic goals.

# Marketing Materials



## The Happiness That Comes From Giving

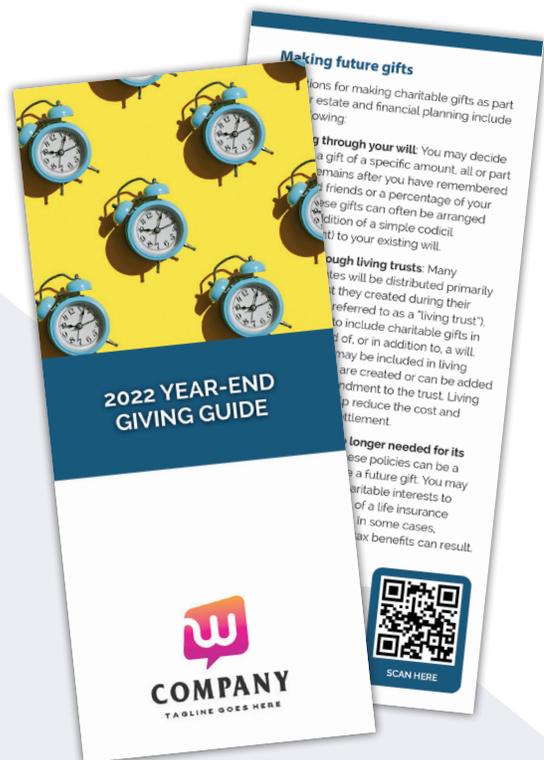
"The Happiness That Comes From Giving" explores the mental and physical health benefits experienced from charitable giving. It includes charitable giving ideas for current or future gifts.

## New This Year!

### Personalized Booklet: 2022 Year-End Giving Guide

Looking for something more in depth? This year, in addition to five brochures in our traditional three-panel format, we are offering a five-panel roll fold booklet, the "2022 Year-End Giving Guide," with more detailed, technical information. Explaining numerous giving options, this informative new booklet illustrates the advantages of each method and provides real-life scenarios so donors can determine the most beneficial way to complete their charitable gifts this year.

**Brand new feature:** This publication includes a dynamic QR code that directs a donor or a donor's advisor to an up-to-date online technical advisory section with hyperlinks to the tax code.



# Additional Materials and Services

## Looking for additional in-depth options?

Sharpe Group has three personalized publications updated for 2022 that you can use to educate your donors, as well as your staff, volunteers and financial advisors in your area, about the most effective ways to make gifts to your organization.

Contact a Sharpe Group consultant for guidance on how to create a fully customized version of these booklets for your organization.

## A Guide to Charitable Giving

“A Guide to Charitable Giving” is designed to appeal to a broad range of donors. This booklet provides general information about the most effective ways to make charitable gifts as well as the tax and other benefits associated with each giving option. Like all of our personalized booklets, this publication contains a QR code that links to up-to-date tax information and contains hyperlinks to the corresponding tax codes.



## 2022 Federal Tax Pocket Guide

  
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Development Director  
1234 First St.  
Memphis, TN 38109  
901.234.5678  
www.yourorganization.org  
charlotte.smith@yourorganization.org

## 2022 Federal Tax Pocket Guide

The 2022 edition of “Federal Tax Pocket Guide” features the most updated income tax and estate tax figures and is an ideal planning aid for attorneys, trust officers, financial planners, accountants and other centers of influence.

## Your 2022 Personal Planning Guide

The “2022 Personal Planning Guide” is the “consumer” version of the popular “Federal Tax Pocket Guide” and is packed with important planning tips for your donors and prospects.

## Your 2022 Personal Planning Guide

  
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# Sharpe Data Services



Who are your donors, and what influences their giving? Donors give different amounts and in different ways based on age, income, net worth and giving history. Through a deeper understanding of your donors and their motivations for giving, you can make more informed decisions when it comes to relationship building, marketing campaigns and creating specific donor targeting strategies.

Sharpe Group offers four levels of Donor Data Services:

- **Data Hygiene** is a low-cost statistical approach to assessing the completeness of your entire donor data file.
- **Standard Data Append** utilizes consumer data to match to your donors, append important demographic details for address, age, gender, income and wealth for communication strategies to turn your donor database into a gold mine of fundraising opportunities.
- **Enhanced Data Append** includes all the information from the Standard Data Append. In addition, donor data corrections and updates are posted to your file. This is a comprehensive report with graphical reporting on your file and a list of up to twenty-five prospective high-income/high-net-worth donors to communicate with immediately.
- **Sharpe Age & Wealth-Based Matrix** provides the Enhanced Data Append plus a report segmenting your donors by age and wealth, allowing you to easily focus your attention on communicating with those most likely to make a large gift.

For more information on how Sharpe Data Services can help your organization raise large gifts, contact your consultant or email [info@sharpegroup.org](mailto:info@sharpegroup.org).



Helping Nonprofits Raise Large Gifts

The tools and advice presented in this eGuide are intended to give you the information you need to design a basic strategy and communications plan to encourage year-end giving. If you feel that you need hands-on support implementing your own strategy or assistance creating a more robust marketing plan for your program, Sharpe consultants are available to provide the guidance and expertise you need.

Our consultants, along with editorial and content experts, have designed unique strategies and custom content for thousands of charitable organizations. We realize that our clients' individual needs are as diverse as their missions. Contact us today to tell us more about the challenges you're facing.



To learn more about how the Sharpe team can augment your program, visit [sharpegroup.org](http://sharpegroup.org) or contact us at 800.342.2375 or [info@sharpegroup.org](mailto:info@sharpegroup.org).

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