PREPARE YEAR-END TAX RECEIPTS

Many organizations send each of their donors a letter during the month of January that itemizes all of the gifts from the donor during the previous tax year.

While not always required by the IRS, such a letter is a convenience for the donor during tax preparation time and serves to remind donors of the importance of their contributions to your organization.
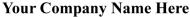
Steps for End of Year Letters:

1. Hover over Reports in the Navigation bar and select **Report Center**.

2. Choose the **Listings** folder from the menu on the left.

3. Click on the **Export to File** option (or hover over **Export to File** and select open on the right).

4. Select **Export type: Main/bio** at the top.

5. Click on **Set Selection Filter** and choose **Build New Selection Filter**.

6. Choose the filter: **GIFT/PLEDGE >> DATE OF GIFT (GIFT_DATE) >> BETWEEN >> 1/1/2016 TO 12/31/2016**.

7. Click **Add More Criteria**.

8. Choose the filter: **GIFT/PLEDGE >> GIFT AMOUNT >> GREATER THAN >> 0**.

9. Click **Continue**, then click **Done**.

10. Check **Include No Mail Names** (this will include records marked

"Do not mail." You can disregard if you wish, but most donors will want a tax receipt).

11. Check **Include Gift List in Mail Merge**, then click on the **Gear** icon to the right of "Check include Gift list in Mail Merge."

   - Normally, it is suggested that you select individual fields above.

   - Select the gift fields you wish to show in the gift listing fields (the defaults normally are Gift Date, Gift Amount, General Ledger).

   - Click Save.

12. Below Export Template, choose a template which contains all required fields for your end-of-year letters. You can always use the Default Mail Merge (shared) template.

13. Click **Instant Merge** below. This will bring up a menu that asks you to select a merge template, then confirms the merge on the next screen as coming from DonorPerfect.

14. Click **Merge** to complete.

If you don't already have a word file to merge to:

1. Head to the **Settings** (Gear Icon) at the top right.

2. Choose **Mail Merge Templates**.

3. Click on **Looking for pre-made templates?** at the bottom right.

4. Scroll down and download the word file called Letter_End_of_Year_Tax_Merge_(Multiple_GiftList_Fields).

5. Open the word file and adjust the wording for your own organization.

6. You are ready to merge your excel file with this word document!

Your Company Name Here
(Non-Profit Tax-Exempt Organization)
Address
Phone No: 215-555-1212
http://www.non-profitorganization.com

Mr & Mrs George Judson
1521 Alhambra Blvd
Los Gatos, CA99999

November 8, 2016

Dear George Judson,
Thank you for your generous support over the past year. I is because of donors like you that we are able to help those in need. Below is a list of your 2014 contributions to our organization.

Date	Gift Amount	GL Code	Type of Gift	Check/Reference#
03/25/2015	25.00	Unrestricted	Credit Card	
03/27/2015	50.00	Annual Appeal	Credit Card	

Total: $75

We look forward to your continued support next year and sharing the organizations success with you in the future.

Sincerely,
Your Name
Title
Company Name
Tax ID:

Here's a sample year-end tax letter:

Refer to the [End of Year Mail Merge with Gift List](#) article for detailed information on creating End of Year Tax Letters.