

Year-End Acknowledgment Letter

Contemporaneous written acknowledgment of a charitable contribution | Final specimen

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A donor letter checked against the finance office's own gift record and against the items the statute asks the acknowledgment to state.

FINAL TEXT

SPECIMEN, PREPARED BY EDITFAST FOR ILLUSTRATION. NOT A REAL RECORD.

Prepared for the Halberd Trust (fictitious), donor acknowledgment letter

EXTRACT FROM THE FINANCE OFFICE'S GIFT RECORD (reproduced unchanged in both panels)

GR-1 Donor: Mr. R. Calloway. Cash contribution received December 3, 2025: \$600.

GR-2 Second gift from the same donor: a framed print, received December 11, 2025. No value is recorded, and the finance office has not appraised it.

GR-3 The donor attended the annual dinner on the \$600 gift. Value of the dinner as determined by the organization's tax advisors: \$85.

GR-4 The organization provided no other goods or services in return for either gift.

GR-5 Wording supplied by the organization's tax advisors for this year's letters, and not to be altered: the deductible amount is limited to the excess of the contribution over the value of the goods or services received.

GR-6 The letter is sent in January of the following year.

Dear Mr. Calloway,

Thank you for your cash contribution of \$600, received on December 3, 2025, and for the framed print you gave us on December 11, 2025.

In return for your cash contribution you received admission to our annual dinner. Our tax advisors have estimated the value of that admission at \$85. The deductible amount is limited to the excess of the contribution over the value of the goods or services received.

We provided no goods or services in return for the framed print.

Your support means a great deal to us.

With warm thanks,

The Halberd Trust