

Mini Tax Statement

Why we developed this:

DRS recommends the tax statement approach for several reasons. **First**, it gives you the opportunity to have a simple, service-oriented contact with donors early in the year. This is particularly valuable for those organization's whose fiscal year does not coincide with the calendar year, and who are looking for a reason to reach out to donors in January and February. **Second**, it provides a low key opportunity to highlight cumulative giving, something that can be a powerful motivator for increasing giving. **Third**, it is a very cost effective opportunity for a gentle ask and a reminder to some who may have let their end of year giving slip by. Several hospitals that did this saw a response rate of over 5%, with a cost per dollar raised of about \$.35.

While we stress that asking often is critical to the success of annual programs, we also believe it is important to inject variety into your solicitations.

Things you should know:

In order to do this effectively you must be able to pull reliable cumulative giving data. Most of our clients choose to highlight unrestricted giving amounts only, excluding memorial, event, and other restricted gifts.

I'm pleased to be a supporter of the ABC Foundation.

Here's another gift of:
 ()\$XX ()\$YY ()\$ZZ () Other \$_____

Mr. and Mrs. John Donor
 4 Money Street
 Anytown, USA 12345-6789

Please return this slip with your gift in the envelope provided.
 Your gift is tax deductible to the extent allowed by law. Thank you!

ABC FOUNDATION
 1 Alphabet Lane, Anytown USA 12345-6789
 000-000-0000 • Fax: 000-000-0000
 director@abc.abc • www.abc.abc



- My check, payable to the ABC Foundation, is enclosed.
- Please charge my contribution to:
 - AmEx Visa MasterCard Discover
- Card# _____
- Exp Date _____
- Signature _____

ABC Foundation
 1 Alphabet Lane
 Anytown, USA 12345-6789

PLACE
 STAMP
 HERE

Tear here and retain the information below for your files.

Dear Mr. and Mrs. Donor: January 2008

We are so grateful for your support throughout the past year. At right, please find a summary of your gifts to ABC Foundation during 2007. Every gift matters to this organization and I thank you for your generosity. I hope this will aid you in your tax preparation.

With thanks,
Sue Brown
 Sue Brown
 Executive Director
 ABC Foundation

2007 CONTRIBUTIONS RECORD

Total of gifts made 1/1/07 – 12/31/07:

\$0,000.000

Thank you for your support.



← Statement tears away, donor returns upper portion with their gift.

Form dimensions:	Carrier envelope:	Reply envelope:
8.5 in.	#10	#9
x 7 in.		



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1 Alphabet Lane
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Important tax information enclosed.

