

End of Year Checklist

Giving



- Donor Profile Cleanup
 - Merge any duplicate donor profiles

- Generate and Send Contribution Statements
 - Ensure statements comply with tax regulations and include all necessary information.

- Download Year-to-Date Reports
 - Transaction Reports
 - Deposit Reports
 - Transaction Fee Billing Reports

- Express Gratitude to Your Donors
 - Send personalized emails to donors, expressing gratitude for their contributions.
 - Consider using various channels such as email, mail, or even a public acknowledgment during a service.

Pro Tip: Did you know you can send mass email, text and voice messages with Ministry Brands' Church Management System? [CLICK HERE](#) for more information on how you can maximize your ministry impact with our several other digital solutions.

- Request Feedback
 - Request feedback from donors about their experience with the giving process.

Pro Tip: You can use the form builder within your giving platform to [create a survey](#) for donors to complete.