

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.

