Tax-Efficient Year-End Giving Checklist for Nonprofits

A timeline checklist for nonprofit staff to keep tax-efficient, year-end gifts on track. Pair with our Year-End Email Templates.

2-3 Weeks Before Giving Tuesday

☐ **Weave tax-efficient giving (stock, QCD) into your Giving Tuesday messaging.**

Many donors don't realize they can make gifts of stock or QCDs toward a Giving Tuesday campaign, or how to do so.

8-10 Weeks Before Year-End

☐ **Send a first reminder to donors who've given stock before that stock gifts are welcome again this year.**

Stock transfers can take longer than donors expect, so early outreach protects your December timeline.

☐ **Draft your QCD appeal messaging for donors age 70½ and older.**

Here is a QCD Appeal Letter Template for easy use.

☐ **Make personal phone calls to key donors to express gratitude and share recent impact.**

A relationship touchpoint before the ask primes donors to consider a larger, tax-smart gift.

☐ **Write a donor story showing how a past stock gift or QCD supported your mission.**

Social proof helps donors unfamiliar with these gift types picture themselves giving this way.

☐ **Post that donor story across social channels and in your email newsletter.**

Repeated, low-pressure visibility builds familiarity before your direct appeal lands.

☐ **Confirm your Ways to Give page is current, with stock and QCD giving clearly explained.**

This is often the first place a donor checks before acting. Here is a Ways to Give Page Template to help.

☐ **Confirm your remit envelope includes a check-box for donors to request more information on stock or QCD giving.**

5-6 Weeks Before Year-End

☐ **Send your QCD appeal to eligible donors.**

Gives IRA custodians enough runway to process the distribution before year-end cutoffs.

☐ **Send a dedicated stock gift ask to your broader donor base via email and social, include success story.**

Share our Tax-Efficient Giving Comparison Chart so they can decide what makes most sense for them.

2-3 Weeks Before Year-End Through December 31

☐ **Send a final "time is running out" stock gift email and social post reminder, include success story.**

Brokerage and year-end volume can slow transfers, donors need a clear final-call date.

☐ **Send a final QCD reminder via email and social, segmenting to IRA-age donors (in email) when possible.**

QCDs must be processed by the custodian before the calendar year closes, not just requested.

☐ **Send a general "last chance for a tax-advantaged gift this year" email & social post in the final week of the year, include success story.**

Prepared by Carnegie Investment Counsel, for information purposes only.