

2023 CHARITABLE GIVING WORKSHEET

My Name _____

Instructions: Please duplicate this worksheet for additional contributions

KEY CHARITABLE CONTRIBUTION FACTS:

- Charitable contributions and donations are deductible only if you **ITEMIZE your deductions** instead of taking the standard deduction.
- Only **qualified charities** are eligible to receive tax-deductible contributions. To verify your charity is qualified go to: [IRS charity search tool](#)
- You must have a **written record** of ALL donations. For donations over \$250, you must get a receipt from the charity by the tax return due date.
- Receipts for \$250 or more **MUST** contain the following, or your donation will be ineligible for a deduction:
 - Organization name, address and date(s) of donation
 - Amount contributed and/or description of contributed property
 - Whether any good or services were provided in return for the donation. If yes, an estimate of the fair market value of the goods or services.
 - If the charity provided "intangible religious benefits" in return for the donation, a statement on the receipt must declare this.

CASH DONATIONS (includes donations via check, credit card, electronic funds transfer, and payroll deductions)

	Total of all cash contributions under \$250*
	Total of all cash contributions \$250* or more.
	GRAND TOTAL CASH DONATIONS

VOLUNTEER EXPENSES (If you do volunteer work for charitable organizations you may deduct **unreimbursed** out-of-pocket expenses incurred in giving services.)

Number of miles driven for charitable organizations (IRS requires a written log)	
Travel expenses (the cost to travel while providing services for a charitable organization is deductible)	

* In figuring whether a gift is \$250 or more, **don't combine separate donations**. For example, if you gave your church \$25 per week for a total of \$1,300 for the year, treat each \$25 payment as a separate donation under \$250.

PROPERTY DONATIONS (tangible items: household items, clothing, cars (provide Form 1098C), collectible, art, etc.)

Name & Address of Charity	Donation Date (mm/dd/yy)	Fair Market Value	How acquired? P=purchase, I= Inherit, G = Gift	Method of Valuation? T= Thrift shop value A= Appraisal, O=Other

TOTAL PROPERTY DONATIONS

STOCK & SECURITIES DONATIONS

Name & Address of Charity	Number of Shares + Stock Name	Fair Market Value	Donation Date (mm/dd/yy)	Acquisition Date (mm/yy)	How acquired? (P = Purchase, I= Inherit, G = Gift)	Cost Basis (PER SHARE)

TOTAL STOCK DONATIONS