



# EOY SGS Education Email Series

## Smart Giving Suite (SGS) Example

*Below, please find an email series to share with your supporters, encouraging them to consider giving a tax-smart gift at the end of the year.*

*This is an example only. In order to receive your email(s) and Tracking Link(s), please request a customized version from your Strategist.*



## Initial Email

**Subject line:** Amplify your impact — without giving cash

**Preview Text:** Discover smart ways to make a difference for [PARTNER] by the end of the year

**Body:**

Dear [NAME],

**Did you know that some of the most impactful gifts don't require cash?**

By giving appreciated **stock**, donating from your **IRA** (if you're 70.5 or older), making a grant from your **Donor-Advised Fund (DAF)**, or contributing **cryptocurrency**, you can support [PARTNER] in a tax-smart way, and make an extraordinary impact before the end of the year.

These ways of giving offer benefits like:

- ✓ Reducing your taxable income
- ✓ Avoiding capital gains taxes
- ✓ Satisfying *Required Minimum Distributions* (if you're 73+)
- ✓ Maximizing your generosity

[Give Now](#)

We've partnered with FreeWill to make this process simple and secure. By using this online platform, you can complete your gift in just minutes.

Together, we can ensure [MISSION IMPACT].

Sincerely,

[SIGNATURE]

**P.S.** If you want your non-cash gift to benefit your 2025 tax returns, make sure to **donate by December 16th** so we have enough time to process it before the end of the year!

## Follow-up Email

**Subject line:** Smarter ways to give before year's end [NAME]

**Preview Text:** Don't miss the chance to make your gift count this year! Give before December 16th



**Body:**

Dear [NAME],

There's still time to make a smart, tax-saving gift this year! Supporting [PARTNER] doesn't have to mean giving cash. Many supporters are using the following options to create an even bigger impact this giving season:

- **Stock Gifts:** Give appreciated stock to avoid capital gains taxes and amplify your impact.
- **IRA Gifts:** If you're 70.5 or older, you can give directly from your IRA to lower your taxable income and satisfy a *Required Minimum Distribution (RMD)* if you have one.
- **Donor-Advised Funds:** Recommend a grant from your DAF to support our mission.
- **Crypto:** Donate cryptocurrency to avoid capital gains tax while supporting [PARTNER].

[Give Now](#)

We've partnered with **FreeWill** to make it quick and simple to make these gifts online. By clicking the link above, you can learn more about each gift and donate within minutes.

Don't wait — the deadline to give is December 16th to ensure it is processed in time!

**Thank you for being part of the [PARTNER] family and helping us [MISSION IMPACT].**

With gratitude,

[SIGNATURE]