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EXAMPLE

EOY SGS Email Series - Educational

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.

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—— EMAIL TEMPLATES ——

Initial Email

Subject line: Explore smart giving options ahead of the end of the year
Preview Text: Gifts for you and [ORG].
Body:
Dear [NAME],

Did you know there are ways to support [MISSION] that extend beyond traditional cash or credit card gifts? By using smart, non-cash giving tools, you can maximize your charitable impact while unlocking significant tax benefits.

Before the year ends, we invite you to explore tax-savvy giving options that directly benefit your financial planning and [ORG].

- **Appreciated Stock:** Transferring stock directly lets you completely bypass capital gains taxes and deduct the full market value.
- **IRA Qualified Charitable Distributions:** Give directly from your IRA, and, if you have a Required Minimum Distribution, you can satisfy it without increasing your taxable income
- **Donor-Advised Funds (DAF):** Instantly recommend a grant from your DAF to deploy existing funds for [MISSION].
- **Cryptocurrency:** Avoid capital gains taxes entirely by donating your cryptocurrency directly to [ORG].

Learn about tax savvy giving

Use this **trusted online tool** to see how your gift can benefit our work, and, if you're ready to give, complete your gift in just a few minutes today!

Together, let's build a future where [VISION] the smart way.

With gratitude,
[SIGNATURE]

P.S. If you want your non-cash gift to benefit your 2026 tax returns, **donate by December 15th** so we have enough time to process it before the end of the year.

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Follow-Up Email

Subject line: Maximize your 2026 tax benefits with smarter giving
Preview Text: Help us plan for 2027 to [VISION].

Body:
Dear [NAME],

As we approach the end of the year, many members of our community are thinking about their finances and their philanthropy. Taking a moment to review your giving strategy and explore smart giving options can help you protect your hard-earned finances while supporting [MISSION] in the most powerful way possible.

Consider **gifts of stock** or **cryptocurrency**, **IRA charitable distributions** (if you're 70.5 or older), or **Donor-Advised Fund (DAF)** grants to support [ORG] and your finances.

Explore Smart Giving Options

The online tool linked above makes it easy to learn about each type of giving, so you can make the most informed gift in minutes.

Please make your tax-smart donation by **December 15th** l to ensure you successfully reduce your capital gains burden or, if you are 73 or older, satisfy your *Required Minimum Distribution (RMD*) for the current tax year. You'll also proactively help us plan for 2027, where [VISION].

Explore your options and donate today. Thank you for your commitment to [MISSION].

With gratitude,
[SIGNATURE]