# Annual Giving Plan

Decide on purpose: what you'll give, where, and how you'll serve this year.

AGreaterCause.com

**Year** _____ **Household** _____

## 1. My giving goal

**Yearly income (optional)** _____ **Percent I'll give** _____

**Yearly giving goal $** _____ **Per month $** _____

**Emergency / disaster reserve $** _____

## 2. Where it will go

| Cause / charity | Share % | Amount $ | How (monthly, once, payroll) |
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## 3. Time I'll give

**Hours per month** _____ **Skills I can offer** _____

**Where I'll serve** _____

**With whom (family, friends, coworkers)** _____

## 4. Why these causes matter to me



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# Gift log

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Record each gift. Tick the box when you have the receipt or written acknowledgment.

| Date | Organization | Cash / goods | Amount $ | Receipt | Notes |
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Reminders: keep a bank record or receipt for every cash gift; get a written acknowledgment for any single gift of $250 or more; for payments over $75 that include a dinner or item, only the amount above its value is a gift. Rules changed for 2026: see AGreaterCause.com/give-smart.



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