



**MSM**ADVISORS

## Charitable Giving Worksheet

Please complete this Charitable Giving Worksheet in order to itemize your tax deductions. It is the responsibility of our clients to maintain their records and receipts of charitable contributions along with other important documents.

**After completing this worksheet, save and upload this file to SmartVault with other tax documentation.**

### CHARITABLE MILES DRIVEN

If you use your personal vehicle for charities or volunteering, please indicate the number of miles driven.

Total Number of Miles Driven for Charity:

### CHARITABLE CASH CONTRIBUTIONS

- 1) **Only include** Charitable Contributions made to a US-based 501C3 non-profit organizations.
- 2) **Do Not** include donations to political organizations, individuals, or GoFund Me webpages.
- 3) **For QCD:** Check the "QCD" box next to Amount Given **IF** the charitable contribution was made directly from your IRA's Required Minimum Distributions (RMD).

Name of Charity:	Amount Given (\$)	QCD

Total Cash Contributions:

\$



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### NON-CASH CONTRIBUTIONS

Use this section to indicate donated items (household goods, clothing, etc.) made to charities and their value.

\* Indicates the **fair market value** for item(s) donated (the amount you are claiming as a deduction).

Name of charity:			
Date of contribution:		* Value (\$):	
Brief description of items donated:			

Charity Address	City	State	Zip

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### CHARITABLE DEDUCTIONS – RECORD KEEPING

For record keeping purposes, it is important that you maintain record of your cash and non-cash charitable contributions. This supporting evidence will be needed in the event of a question directly from the IRS or audit.

- Records to keep for Cash Donations less than \$250: bank record, receipt, or written acknowledgment from the charity.
- Records to keep for Cash Donations greater than \$250: letter from the organization listing the donation amount and if goods or services were provided to the donor by the organization in return.

Non-Cash Donations: State a description and approximate value of those goods and services and keep photo documentation of donated items for your records.