Keep Track of Your Giving

Why create your giving inventory?

Keeping an inventory of your giving is a great way to focus your giving and monitor your charitable giving budget. Your giving inventory can show you:

- When you gave.
- How much you gave.
- Which charities you gave to.
- Each charity's cause, issue or mission.
- What geographic area(s) they serve.
- What triggered the donation.
- Who asked for the donation.

Bonus: your inventory will help you at income tax time

Keep your charity receipts and acknowledgments with your inventory. It's a great way to protect charitable contribution deductions.

For more complete results, include donations from the past

You can use your giving inventory moving forward only. Also consider looking for donations shown in your checkbook, credit card statements and income tax returns for one or more past years. Adding past donations to your giving inventory is a great way to build your history and sharpen your focus.

Always include the organization's EIN (employer identification number)

It's the best way to check the group's identity and tax status. Having the EIN can be a great help at tax preparation (or audit) time.

Review your results regularly

Your giving inventory shows your giving results. Are you giving to causes you care about? Or don't care about? Are you responding to triggers that surprise you? Have you been focusing on the geographic area you want?

The My Giving Inventory form

The next page provides a blank My Giving Inventory form. **Print it out and start tracking!**

My Giving Inventory

Donation Date	Donation Amount	Organization Name	Organization EIN	Cause, issue or mission	Area Served (a)	Donation Trigger (b)	Who Asked (c)	Other information

Notes:

(a) Local; Regional; National; International

(b) In-person request; Mail; Email; Telephone; other: (describe)

(c) Family member; Friend; Business colleague; the Charity; other: (describe)