

INDIVIDUAL GIFT-IN-KIND

Tax Receipt Request Form



United Way
Alberta Capital Region

Use this form when an individual wants a tax receipt for an item that was purchased and donated for use in a workplace auction or raffle. The donor completes sections 1 through 4 and the event coordinator completes section 5 and submits the form with the supporting documentation.

SECTION 1 – DONOR INFORMATION

Name _____

Email _____

Home Address *(United Way will not issue tax receipts to office addresses)*

City

Province

Postal Code

SECTION 2 – GIFT INFORMATION

Description of Donated Item(s)

Fair Market Value

(Excluding GST)

\$

Type of Gift and Fair Market Valuation Method

If the total fair market value of all donated items from one donor is more than \$1,000, an appraisal of the item(s) by a qualified third party is required at the expense of the donor.

☐ **Purchased** – Item(s) purchased from a retailer above \$20 and a store purchase receipt is provided.

☐ **Previously Owned** – No purchase receipt is available, but value is based on recent comparable online sales. Platform name, sales dates, and screenshots of completed sales listings are provided.

☐ **Business Inventory** – Item(s) donated from the donor's business inventory. An invoice showing the FMV of the items marked "Gift Donation" and evidence of regular retail pricing (website, catalogue, price list etc.) are provided.

☐ **Original Artwork** – Item is original artwork created by the donor. Recent sales receipts for similar works, a price list or gallery invoice, or exhibition / portfolio pricing are provided.

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SECTION 3 – USE OF DONATION

This donation was used for:

☐ Auction ☐ Raffle

Event Format:

☐ Online ☐ In-Person

If Online – Website Link _____

If In-Person – Event End Date _____

SECTION 4 – DONOR DECLARATION & AUTHORIZATION

☐ I certify that the information provided in this form is accurate and complete to the best of my knowledge and complies with the United Way Tax Guide.

☐ I understand that United Way may request additional documentation and may decline to issue a tax receipt if requirements are not met.

Name _____

Date _____

SECTION 5 – FUNDS SUBMISSION & VERIFICATION

This section is to be completed by the event co-ordinator

Organization Name _____

Event Co-ordinator Name _____

Have the proceeds from
this event been transferred
to United Way?

☐ Yes

☐ No

Requests submitted before funds are received will be held until receipt of funds is confirmed. All fundraising proceeds must be received by United Way no later than December 31 to qualify for a tax receipt for that calendar year.

How were the funds
submitted?

☐ Picked up by UW Staff

☐ Electronic Funds Transfer

☐ Cheque (mailed)

Date Funds Were Submitted or Picked Up _____

UW Staff Member Name (if picked up) _____

Event Co-ordinator Certification

☐ I confirm that the item(s) described above were donated by the individual listed in Section 1 and were used in a United Way fundraiser as described in this form.

Name _____

Date _____

Submission Instructions:

Please email the completed form and store purchase receipts to campaignsupport@myunitedway.ca

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SECTION 6 – UNITED WAY REVIEW & APPROVAL (INTERNAL USE ONLY)

Campaign Support Verification

- ☐ Item(s) were used in a United Way fundraiser
- ☐ GST has not been included in the requested amount
- ☐ Fair Market Value has been reviewed and verified
- ☐ Only the eligible donation portion has been included for tax receipting purposes.

Fair Market Value / Eligible Amount Notes (if applicable)

FMV / Eligible Amount Calculation Details:

Salesforce Envelope # _____

Name _____

Date _____

Director Review & Approval

- ☐ I confirm that I have reviewed this request and that all requirements have been met.

Name _____

Date _____