

SPECIAL EVENT



United Way
Alberta Capital Region

Tax Receipt Request Form

Use this form when your organization holds a qualifying special event and tax receipts cannot be issued automatically through United Way's digital fundraising platforms.

This form is required only when:

- Funds were collected in person at the event (e.g., cash or debit machines), or
- Funds were collected online through a non United Way event platform.

If the event qualifies for tax receipting and donations were collected through United Way's online platforms (e.g., Classy or United Way hosted auction sites), tax receipt requests will be submitted automatically on behalf of donors, and this form is not required.

This form must be completed in full by the event co-ordinator and submitted with a completed donor Information Excel file.

SECTION 1 – DONOR INFORMATION



Download and complete the **Tax Receipt Donor Information Template.xlsx** and attach it to this submission. This form must include complete donor information for all contributors.

Please note: **Each individual donor must have contributed a minimum of \$20 to receive a tax receipt. Amounts under \$20 per person are not eligible. A home address is required for each donor. Tax receipts cannot be issued to office addresses.**

SECTION 2 — DONATION & EVENT DETAILS

Special Event Title & Description _____

Date Event was Held on: _____

Event Format: ☐ In-Person ☐ Online – Not hosted by United Way

SPECIAL EVENT GIFT-IN-KIND TAX RECEIPT REQUEST FORM



United Way
Alberta Capital Region

Special Event Eligibility and Receipting Category

Select ONLY ONE category

- ☐ **Sponsorship of a Participant in a Dare or Challenge** – Donations were made to sponsor one or more individuals participating in a fundraising challenge or activity (e.g., Chicken wing eating contests, Run/walk/stair climb /head shaving etc.).
- ☐ **Casual / Dress-Down Day Contributions** – Donations were made to participate in a casual or themed dress day (e.g., Jeans Day, Ugly Tie Day). The participation benefit is nominal in value.
- ☐ **Auction Donation** – Bid Exceeding Fair Market Value – Donations represent only the portion of an auction bid that exceeds the fair market value of the item by at least 25%.
- ☐ **Voluntary Donation at a Free Event** – There was no required participation fee or set ticket price. The event was free to attend and participate in, and donations were made voluntarily. Examples may include activities such as a dunk tank, pie throwing, free BBQ etc.
- ☐ **Paid Event (Voluntary Donations Above Participation Fee)** – The event had a participation fee that covered the cost of participation or other material benefits. Some donors made additional voluntary contributions above the required participation fee. Only the portion exceeding any participation fee has been included for tax receipting.

SECTION 3 – FUNDS SUBMISSION & VERIFICATION

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

- ☐ The event described above meets the eligibility criteria selected in Section 2.
- ☐ The donor information provided in the attached Excel file is accurate and contains only home addresses.
- ☐ Where applicable, only the portion of contributions exceeding any participation fee or fair market value has been included.

Name _____

Date _____

Submission Instructions:

Please email the completed form and Excel file to campaignsupport@myunitedway.ca

**SPECIAL EVENT GIFT-IN-KIND
TAX RECEIPT REQUEST FORM**



United Way
Alberta Capital Region

SECTION 4 – UNITED WAY REVIEW & APPROVAL (INTERNAL USE ONLY)

Campaign Support Verification

- ☐ The event meets the eligibility criteria selected in Section 2.
- ☐ The attached donor information file is complete and only contains home addresses.
- ☐ Where applicable, participation fees, fair market value advantages, or auction fair market values were reviewed and only the eligible donation portions were included in the donor spreadsheet.

Internal Notes / Calculation Details (if applicable)

Paid Event Participation Fee / Advantage Details:

Auction FMV Verification 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 _____