

POOLED FUNDS GIFT-IN-KIND

Tax Receipt Request Form



United Way
Alberta Capital Region

Use this form when multiple individuals contribute funds to purchase items for a United Way fundraiser. This form is to be completed entirely by the event co-ordinator and must be submitted with a completed donor Excel file and supporting store purchase receipts.

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 – GIFT INFORMATION

Description of Donated Item(s)

Total Amount of Donated
Items on Store Receipts

(Excluding GST)

\$

Tax receipts cannot be issued for the GST portion of a purchase. The Fair Market Value entered above and the total in the attached Excel file must both equal the pre-tax amount shown on the store purchase receipt.

If all contributors wish to receive a tax receipt, the event co-ordinator must adjust the donor amounts so that the total in the Excel file equals the pre-tax purchase amount. This can be done by either:

- Reducing one donor's amount by the full GST portion, or
- Reducing all donor amounts slightly so the Excel total equals the pre-tax amount.

Example: If an item cost \$200 before tax and \$210 including GST, only \$200 is eligible for tax receipting. The fair market value entered above and the Excel total must both equal \$200, not \$210.

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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 – 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

☐ Itemized store receipts for all purchases will be included in the email submission

☐ The total eligible amount entered above reflects the pre-tax value of documented purchases only.

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

☐ I confirm that all funds were collected for the purpose of purchasing item(s) for a United Way fundraiser and were used accordingly.

Name _____

Date _____

Submission Instructions:

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

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SECTION 5 – 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 _____