



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.

Note: Storen Financial only needs the information and totals from this worksheet to complete your tax return. We do not need copies of the receipts.

CHARITABLE MILES DRIVEN

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

CHARITABLE CASH CONTRIBUTIONS

Charitable contributions made directly from your Required Minimum Distributions (RMD) from an IRA to a charity can be notated by checking the Qualified Charitable Distribution (QCD) box in the right-hand column. Please note that the IRS does **not** allow QCDs for anyone under the age of 70.5. If a QCD, list each charitable cash contribution. If not a QCD, you may combine all contributions and indicate the combined total. List donations to an Indiana college or university separately.

- 1) Charitable contributions are only deductible when donated to a US based 501C3 non-profit organization.
- 2) Donations to political organizations, individuals, or GoFund Me webpages are not tax-deductible.

Name of Charity:	Amount Given (\$)	QCD

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Charitable Giving Worksheet



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				
Name of charity:								
Date of contribution:	* Valu							
Brief description of items donated:								
Charity Address	City		State	Zip				
Name of charity:								
Date of contribution:		* Value (\$):						
Brief description of items donated:								
Charity Address	City		State	Zip				

CHARITABLE DEDUCTIONS - RECORD KEEPING

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

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. State a description and approximate value of those goods and services and keep photo documentation of donated items for your records. Donors MUST have this documentation before the timely filing of the tax return. W-2 and pledge card from the charity is sufficient for payroll deductions.