



TAX-TIME TOOLKIT

IDEAS FOR YEAR-END
TAX APPEAL MESSAGING

Tax-Time Toolkit

Ideas for Year-End Tax Appeal Messaging



What makes a great email subject line and call to action?

When you send your year-end email to donors, be sure to put some thought into your subject line and use a clear call-to-action that is specific and actionable. Short subject lines perform best, especially when they grab attention or pose a question. In email form, your call-to-action can be a button that links donors to your donation page or a strong phrase that motivates them to take action.

Start your call-to-action with a verb like “Donate Now” that makes it clear what action your supporters will be taking on the subsequent page. Make your call-to-action easy to spot with eye-catching colours.

Strong email subject line examples:

- Just 24 Hours to Make Your Donation for a 2020 Charitable Tax Receipt
- 3 Days Left to Make Your 2020 Tax-Back Charitable Donation!
- Last Chance! Make Your Year-End Charitable Donation by Midnight
- Have You Made Your Tax-deductible Charitable Donation?

Looking for a softer message?

Perhaps this is your first year-end appeal and while you are serious about raising funds, you want to ensure that you don't catch your donors by surprise. Consider an email subject line and call-to-action that hints at government tax-incentives using softer messaging. Lead your email with the important work that you do and why you need support. Include tax-time benefits as a secondary call-to-action.

Ideas for softer messaging:

- It's not too late to donate for a 2020 charitable tax receipt.
- Donate by December 31st to receive a charitable tax receipt for your 2020 return!
- Donate before midnight on December 31st and instantly get a 2020 charitable tax receipt.

Carefully consider your visual.

If you're using tax-time as a secondary call-to-action, use a strong visual like the Give & Save calculator available for download in the Tax-time Toolkit. This will ensure that your tax-time message doesn't get lost in your email.

If tax-time is the primary message in your email, you can soften it up with a visual that communicates the work your charity does, or use a more playful creative like our "Wrap up the year by giving back" graphics that are available for download in the Tax-time Toolkit.



Still concerned about being too direct with your donors?

Try a more conversational approach with your donors when reminding them about tax-incentives. Offer information and let them know that it's a way for their charitable dollars to work even harder.

Examples of a Conversational Approach:

The busiest season for charitable giving is upon us. It's this time of year that our organization receives X% of its support. Please mark your calendar and schedule time to make your year-end donations. We accomplished so much in 2020 and with your help can do even more in 2021.

As the end of the year closes in, time is running out on tax deductible donations. About 25% of Canadians take advantage of the sizeable benefits Canadian Federal and Provincials governments offer to Canadians who give to registered Canadian charities.

These tax incentives are significant, amounting to as much as 53% of your charitable donation. For many Canadians, it's by leveraging these tax benefits that they can give more generously to charities. It makes them feel good and with their larger gift, it enables the charities they support to do more. Now, that's a good thing.

At <Charity Name>, the needs for <cause-specific messaging> continue to increase. Please consider keeping us in mind as you make your year-end-of-year donation.

Ready to drive home the bottom line benefits of claiming charitable donations?

Given that the vast majority of Canadians claim to give to charities but just less than 25% of Canadians claim their charitable donations on their tax return, you may want to make sure they know the benefits!

If you have donors from across Canada, feel free to use the table below. If most of your supporters are located in one province, you can pull out the details that work best for you.

To easily calculate the tax savings for a donation of any amount, use the CanadaHelps tax calculator at: www.canadahelps.org/taxtime/

Canada/province/territory	2017 rates for eligible amount up to \$200	2017 rates for eligible amount over \$200	2016 rates for eligible amount up to \$200	2016 rates for eligible amount over \$200
CA	15.00%	29.00%*	15.00%	29.00%*
AB	10.00%	21.00%	10.00%	21.00%
BC	5.06%	14.70%	5.06%	14.70%
MB	10.80%	17.40%	10.80%	17.40%
NB	9.68%	17.95%	9.68%	17.95%
NL	8.70%	18.30%	8.20%	16.80%
NS	8.79%	21.00%	8.79%	21.00%
NT	5.90%	14.05%	5.90%	14.05%
NU	4.00%	11.50%	4.00%	11.50%
ON	5.05%	11.16%	5.05%	11.16%
PE	9.80%	16.70%	9.80%	16.70%
QC	20.00%	24.00%	20.00%	24.00%
SK	10.75%	14.75%	11.00%	15.00%
YT	6.40%	12.80%	6.40%	12.80%

Chart reproduced from: <https://www.canada.ca/en/revenue-agency/services/charities-giving/giving-charity-information-donors/claiming-charitable-tax-credits/charitable-donation-tax-credit-rates.html>

Concerned about questions related to tax matters?

This is understandable. We suggest including some copy at the end of your communication piece explaining that you're providing directional guidance only and that it does not account for all possible tax situations.

You can also include links to the Canada Revenue Agency website where your donors can find more information.

Please visit: <https://www.canada.ca/en/revenue-agency/services/charities-giving/giving-charity-information-donors.html>



Did you benefit from
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