

How to Issue Tax Receipts for Couples

Last Modified on 03/27/2023 10:23 am EDT

Donor Management System

If you want to recognize a couple on a Tax Receipt, you can:

1. Add each person as [Individual Contacts](#),
2. [Associate them](#) with a Household Contact, and
3. [Issue the Tax Receipt](#) for the Household.

Table of Contents:

- [Considerations](#)
- [Example](#)

Considerations

Before adding contributions to a Household, consider adding it to an Individual contact.

Who is the true donor of this gift?

Two Contacts can only be [merged](#) if they are the same [Contact Type](#). We recommend adding new Contacts as Individuals in order to successfully merge them with existing Individuals and retain contribution data as needed.

Example

Let's say you are trying to issue a single Tax Receipt for the fictional couple Michael Scott and Holly Flax:

1. Add Michael and Holly each as **Individual Contacts**
2. **Create [Relationship](#) links** between Holly and Michael
 - If you want to refer to them as “partners”, you should add a “Partner of” Relationship link on both Holly and Michael's Profiles.
 - Or you can add a “Husband of” Relationship on Michael's Profile and “Wife of” Relationship on Holly's Profile.
3. **Add a new Household Contact** named “Holly Flax & Michael Scott Household” or similar. The Household name will show up on the Tax Receipt

- **Add a main Billing Address** to the Household so you can issue Tax Receipts to it.

4. **Create Relationships** between Holly and Michael + the “Holly Flax & Michael Scott” Household

- As an example, Holly Flax will be a “Household Member of” Holly Flax & Michael Scott Household.

5. **Add your Contribution** under the Household

6. **Issue your Tax Receipt**

- Before emailing/printing the Receipt, it's advisable to run it as a Preview so you can see exactly how it will be issued.

7. **To send the Receipt via email, include the desired email address** on the Household Contact Profile.

Note: Creating Relationship links between Contacts is not necessarily mandatory, but we highly recommend doing it as a best practice to better segment and filter your Contacts' information.