CDM+ Essentials
YEAR-END CHECKLIST

- ☐ Enter all donations postmarked by Dec. 31.

- ☐ Process pending donations.

- ☐ Merge duplicate donor records.

- ☐ Send statements by Jan. 31.

These items and time frames are suggestions only. Depending on the CDM+ programs you use and whether your accounting is done on a calendar or fiscal year, some items will not apply to you. Check out january.suran.com for additional year-end resources, including videos and webinars.

CDM+ makes it easier than ever to stay on target and complete year-end tasks in record time. Electronically file W-2s or 941s, review giving trends, and much more in in the full CDM+.

If interested in learning more about what's possible, please reach out to sales@cdmplus.com.

january.suran.com