

## End of Year Information

### STATEMENT

To mitigate costs, we now email monthly statements instead of mailing paper copies. However, if you have not been receiving the email versions, please (1) check your spam email, and (2) check to ensure we have the correct email address on file. If you still prefer to receive statements by regular mail, please let us know.

### YEAR END DONATIONS FOR TAX DEDUCTIONS & 2023 TAX STATEMENT

**To ensure that your donations are included in your 2023 Beth Israel Donor Tax Statement:**

**Checks-** If paying by check, **your check must be received by Beth Israel Before December 20<sup>th</sup>** to ensure that the bank has ample time to process your payment. For control purposes, all checks we receive by mail or in person are forwarded to the bank for processing before they are recorded on your account.

**Online Payment-** To ensure that your donations are included in your **2023 Beth Israel Tax Statement**, **payments must be paid online (by credit card or e-check) by December 28<sup>th</sup>.**

If your **2023** payment is not reflected on your Beth Israel Tax Statement and it was made by you prior to December 28<sup>th</sup>, you can work with your accountant to determine how to include on your **2023** tax return, regardless of whether it gets recorded on the **2023** Beth Israel Tax Statement.

**2023** Beth Israel Tax statements will be emailed by January 22, 2024. If you would like it sent by regular mail, please let us know.

## YOUR SHULCLOUD ACCOUNT

In December 2020, we transitioned to a new data database platform called Shulcloud! This interactive platform allows you to **pay online, update your personal information, and keep track of your donations and balance activity.**

### Account Access

If you currently do not have access, but would like to, call or email us for assistance.

### Automatic Recurring Payments

Many of you have already set up **automatic recurring payments** through ShulCloud- thank you!

*Please note that recurring payments must be set up each July 1 (the beginning of our new fiscal year) because the amount of your annual commitment may change, and we require your authorization annually.*

If you need assistance in setting up recurring payments (credit card, e-check, etc), please call or email us for assistance.

## DID YOU KNOW?

Congregation Beth Israel offers multiple payment options which include:

- **Online Payments-** Payments can be made online by either a credit card or e-check.
- **Donor Advised Payments-** Payment by checks or ACH.
- **Stock Transfers-** For stock transfers, email [accounting@beth-israel.org](mailto:accounting@beth-israel.org) for detailed instructions on how to transfer funds. *Please provide advance notice to the accounting department of incoming stock transfers so that we can ensure that these donations get credited to the correct account as there is often little to no additional information provided with the transfers.*
- **Checks-** all checks received are mailed to and processed by our bank. Please allow 7-10 businesses days for your check to be applied to your ShulCloud account. *Note that all checks dropped off at the office will be sent to the bank for processing.*

**Payments Should be made payable to Congregation Beth Israel and mailed to:**

Congregation Beth Israel  
Dept.  
P.O. Box 4851  
Houston, TX 77210-4851