

A TAKEAWAY GUIDE FOR WEBINAR ATTENDEES

Finish the Year Faithfully

Six quick wins your team can put in place in Realm before December 31, so every gift is easy to give and every guest is ready to be welcomed. Each one takes an afternoon or less.

YOUR YEAR-END CALENDAR

DEC 1

Giving Tuesday

Kick off year-end giving with a scheduled text and email.

DEC 15

Stock gifts start

Brokerage transfers take several business days.

DEC 24

Christmas Eve

Guests arrive. Have connection points ready.

DEC 31

Last day for 2026

Final reminder; gifts must be made by year-end.

1

Make Giving Easy to Find

Meet people wherever they are this season.

GIVING FORMS · QR · TEXT-TO-GIVE · NFC

Realm giving forms can now be shaped to fit your church's story and brand, and shared just about anywhere.

- ✓ Create a dedicated year-end giving form with a short story about what 2026 gifts made possible
- ✓ Put its QR code on Christmas Eve slides, bulletins, and programs, and its link in every email
- ✓ Add text-to-give and an NFC tap point in the lobby, and embed the form on your website

2

Invite Gifts of Stock & Crypto

Let people give from all God has entrusted to them.

STOCK • CRYPTO • ENGIVEN

Year-end is when investors review their portfolios. Realm accepts stock and crypto right on your giving forms through Engiven.

- ✓ Confirm your Vanco merchant account, then enable it under Settings > Additional Features
- ✓ Announce it early and repeat it; ask givers to start stock gifts by December 15
- ✓ Name one staff point person, and always point givers to their own tax advisor

3

Schedule Your Year-End Messages Now

Write it Tuesday. Let it send itself Saturday.

SCHEDULED TEXT & EMAIL • PERSONALIZATION

Texting now clearly identifies your church as the sender, and every message can greet people by first name.

- ✓ Write your Giving Tuesday, December 15, and December 31 messages in one sitting and schedule them
- ✓ Use first-name personalization so each note sounds like it came from a person, not a system
- ✓ Set event reminders for Christmas services so members and guests know when to arrive

4

Make Mobile Giving One Tap

Remove every step between generosity and the gift.

CONNECT APP • APPLE PAY • GOOGLE PAY • PASSKEYS

The Connect app now supports native Apple Pay and Google Pay, plus passkey sign-in.

- ✓ Show a 30-second walkthrough of giving in Connect during a December service
- ✓ Encourage members to set up a passkey before the holidays to skip password resets
- ✓ Feature Connect in your Giving Tuesday and year-end messages alongside the giving link

5

Be Ready for Christmas Guests

Every first visit deserves a second invitation.

PROFILES · PATHWAYS ·
CHECK-IN · VOLUNTEERS

Christmas services bring people who may not be back until Easter, unless someone follows up.

- ✓ Place a connection card QR code on seats and screens so guest details land in Realm Profiles
- ✓ Build a guest Pathway now: a thank-you within 24 hours and a January invitation
- ✓ Confirm allergies and emergency contacts flow into Check-In, and duplicate volunteer schedules for each service

6

Thank Well and Close the Year

Gratitude is the start of next year's generosity.

STATEMENTS · DASHBOARDS

How you receive a gift shapes whether it is given again.

- ✓ Thank first-time and stock or crypto givers personally within 48 hours
- ✓ Plan your January statement run; email or print in a few clicks, with non-cash gifts acknowledged
- ✓ Review giving trends by fund and payment type in Dashboards to plan for 2027

The best part? Every step above happens inside Realm. Giving, communication, check-in, volunteers, and the Connect app share one set of data, so nothing has to be re-entered.

Want Help Getting Ready?

Realm customers can reach your account team at [SUPPORT OR CSM LINK].
New to Realm? See how it all works together in a personalized walkthrough.

[Request a Demo →](#)

acstechnologies.com/demo

This guide is general information, not tax or legal advice. Givers should consult their own tax advisor.