

PG Calc Partners with CPC and Kallina & Associates, LLC



Today, professional advisors require trustworthy sources to stay current on the latest charitable, estate, and financial planning information. Non-profits can play a role in providing this type of information and at the same time forging and cultivating solid relationships with this important constituency in the planned giving community.

The wait for this solution has been worthwhile.

PG Calc has collaborated with CharitablePlanning.com (CPC) and Kallina & Associates, LLC, industry leader of charitable, estate and tax planning, to offer (CPC) to charities who want to reach out to the professional advisors of their donors and prospects.

What is CPC?

CPC is a weekly newsletter and website written in conjunction with Kallina & Associates, LLC that provides a simple digest of the substantial volume of relevant and timely information in the charitable arena. It offers additional value through informed, thoughtful, and comprehensive commentary on these pieces of news. Appropriate audiences include charitable gift planning professionals, practitioners such as lawyers, accountants, financial advisors, and insurance specialists, donors and prospects who desire a deeper understanding of charitable giving.

What are the benefits?

Your organization will maximize the ability of donors to give by educating your audience through a simple, comprehensive, and understandable newsletter and website that is customized to your organization.

The screenshot displays the XYZ CHARITY website interface. At the top, there is a navigation bar with links for Home, About Us, Make a Donation, Get Involved, Consulting, and a search bar. Below the navigation bar, the main content area is titled "Consulting" and features a sidebar with links for Commentary, Calculations, Tools, Profile Settings, and Logout. The main content area is divided into "Current Events" and "Newsletter" sections. The "Current Events" section lists three items: "Tax Court Denies Conservation Easement" (Tuesday, September 15, 2009), "Proposed Regs on Reportable GST Tax Avoidance" (Monday, September 14, 2009), and "PLR 200937038 - Foundation Grants to Formerly Controlled Charity" (Monday, September 14, 2009). The "Newsletter" section shows a preview of the "Tax Court Denies Conservation Easement" article, including a "Highlights" section and a "Battleground" section. At the bottom of the page, there is a footer with contact information and a copyright notice.

CPC allows your staff and advisors to stay current on complex matters in a simple and understandable format. Keeping up with the volume and complexity of current events, regardless of your level of expertise, can be daunting at best. Frequently, the expert in charitable planning does not have the time to read every current event to determine relevance or to “mine” planning tips.

At the other end of the spectrum, the beginner in planned giving may not be able to understand why a case or ruling is worthy of particular attention. CPC is useful as a staff education tool for both the expert and the beginner.

There are several sites which provide information about planned giving. But no other industry-related website comprehensively integrates planned giving with broader areas such as:

- Tax exempt planning
- Estate planning
- Financial planning
- Investments within charitable vehicles
- Securities laws
- Deferred compensation
- Partnerships
- LLCs
- Corporations
- Tax shelters

CPC gives a behind-the-scenes look at events in Congress and the IRS. From the planner's perspective, it is important to anticipate potential changes in the law. CPC alerts readers to facts and trends and provides the best judgment of what may occur, based upon evolving patterns in the ever-changing legislative, legal, and regulatory landscapes.

Product Content and Features:

- CPC Website:
 - Commentary
 - Articles
 - Case Studies
 - Current Events
 - Speeches & Outlines
 - Forms & Documents
 - Glossary of Terms
 - Related Links
- Weekly Customizable Newsletter
- Handbook
- Calculations (*GiftCalcs*)
- Two Levels of Organizational Branding

Product Selections	CPC Standard Branding	CPC Premier Branding
CPC Website & Newsletter	Annual Fee	Annual Fee
First 100 users (1-100), minimum charge	\$295.00	\$445.00
Next 900 users (extra charge per user)	\$2.50	\$4.00
CPC Website, Newsletter, & Handbook		
First 100 users (1-100), minimum charge	\$495.00	\$645.00
Next 900 users (extra charge per user)	\$5.00	\$6.00
CPC Website, Newsletter, Handbook, & GiftCalcs		
First 100 users (1-100), minimum charge	\$795.00	\$945.00
Next 900 users (extra charge per user)	\$6.00	\$7.00

The comprehensive nature of the CPC Commentary makes CPC truly “inter-disciplinary” because while other areas of law and financial and estate planning impact charitable giving, there is a need to integrate various disciplines in order to avoid running afoul. CPC’s Commentary and analytical articles address such issues and potential pitfalls.

About PG Calc

PG Calc supports thousands of clients with expertise and excellence in products and services for charitable gift planning and planned gift administration. We value every opportunity to respond readily to them so that the needs of their programs can be met. At the same time, we strive to create a personal relationship and to work in partnership with every client for the benefit of that organization’s mission.

About Kallina & Associates, LLC

Established in 1982, Kallina & Associates, LLC is a nationally recognized law firm focusing on federal tax law, estate planning and charitable giving. Since our inception, we have developed a reputation for innovative solutions to difficult problems. We endeavor at all times to provide the highest quality of legal services to our clients, with a sense of urgency and absolute dedication.