

Gift Administration Software and Services

We can help you with gift administration no matter how you choose to do it.



Gift Administration Software and Services

You can do the work, we can do the work, or you can choose a combination.

Administering planned gifts is a fundamental part of the planned giving process. Unfortunately, there is frequently a gap between recognizing the value of good gift administration and actually delivering it.

It's not surprising. The process is complex, state regulations change often, and compliance responsibilities typically come with the territory.

That's where we come in.

PG Calc has been the recognized leader in gift administration software and services for more than 20 years. We've been through more year-ends, tax seasons, deaths, severances, and exceptions to the rule than you can possibly imagine. No wonder more charities, banks, asset managers, and service providers rely on us for our gift administration expertise than on any other company.

GiftWrap 4.0 takes gift administration to another level.

GiftWrap, our software product for gift administration, is the proven choice for charitable organizations and service providers that share the common goal of efficient and effective gift administration. And now, with the introduction of Web-based *GiftWrap 4.0*, we've made the entire process easier and more secure.

By moving *GiftWrap* from the desktop to the Web, we've minimized technological complexities. You can access *GiftWrap 4.0* from any computer with an Internet connection. What's more, *GiftWrap 4.0* eliminates installation issues and guarantees automatic updates. Not only are you assured of up-to-date technology with no upkeep on your end, but you'll never again need to worry about issues such as disaster recovery, backup procedures, database corruption, coordination with IT, or even the long-term viability of your hardware.

Consider what *GiftWrap* enables you to do:

- ▶ **Track donors, beneficiaries, prospects, and advisors**
- ▶ **Store detailed information for all planned gifts and bequests**
- ▶ **Print management reports to measure program success**
- ▶ **Calculate state-required gift annuity reserves**
- ▶ **Perform FASB 116/117 liability calculations**
- ▶ **Project cash flow expectancies from planned gifts and bequests**
- ▶ **Track the value of each gift annuity over its lifetime**
- ▶ **Maintain unlimited notes on people and gifts**
- ▶ **Have the reassurance of four levels of security, including a comprehensive audit trail**

Optional modules include functionality that adds to *GiftWrap's* value:

- ▶ **Produce beneficiary payments by check or electronic fund transfer**
- ▶ **Produce 1099-R tax forms for gift annuitants and files for IRS**
- ▶ **Perform all tasks to administer pooled income funds, including K-1 production**
- ▶ **Create custom upload files, checks, and reports**
- ▶ **Automate your gift administration workflow**
- ▶ **Store documents of record in a centralized, online repository**



What if you don't want to do the gift administration work yourself?

Then PG Calc will do it for you. Hundreds of charities, banks, and service providers trust us to manage the gift administration process for them. You can too. Then you can focus on what you do best.

Working closely with you and your asset manager, we deliver back-office administration services that include records maintenance, beneficiary payments, tax reporting, and more. Your donors never know we're there, especially if you opt to include your organization's logo on the payment checks. What they do know is that their payments arrive on time, and their tax forms are expertly and flawlessly prepared.

We can also work with you to execute other aspects of gift administration, including compliance reporting, helping you with process implementation, and auditing and evaluating your current gift administration procedures. Additionally, some programs will benefit from a thorough risk assessment designed to determine to what extent their gifts are likely to result in positive remainders.

Or you may prefer that we share the responsibility.

Many of the organizations we work with want to keep portions of the gift administration process in-house, but also appreciate the fact that they can rely on us to handle some of the more complex tasks.

For example, it is common for clients to use *GiftWrap* to perform such functions as tracking donor activities and calculating cash flow. But when it comes to generating tax forms, doing FASB and state reserve compliance reporting, doing actuarial certifications, and even in many cases making payments to donors, these organizations are more comfortable turning those production functions over to us.

Many of our charity customers tell us that outsourcing gift administration to PG Calc gave them the flexibility to choose the asset managers in whom they had the most confidence, rather than having to select a financial partner from the short list of those that also offer gift administration.

Whether you choose to do gift administration yourself or ask us to handle some or all for you, the bottom line is this:

With PG Calc's help, you know it will be done well.



For more information
about PG Calc

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Gift Administration Options

At PG Calc, we work with our clients three different ways.



THE IN-HOUSE SOLUTION
**Do it all yourself
with GiftWrap**



**Choose what you'll do,
and what you'd like us to do for you**



THE OUTSOURCE SOLUTION
**Have us do
everything for you**

- ✓ Track donors, beneficiaries, prospects, and advisors ✓
- ✓ Store detailed information for all planned gifts and bequests ✓
- ✓ Produce beneficiary payments by check or electronic fund transfer ✓
- ✓ Produce 1099-R tax forms for gift annuitants and files for IRS ✓
- ✓ Print management reports to measure program success ✓
- ✓ Calculate annuity reserves and FASB liabilities ✓
- ✓ Project cash flow from active planned gifts ✓
- ✓ Track gift annuity value over its lifetime ✓

Unsure about the best gift administration option for your program's needs?
Call us toll-free at 888-497-4970 or visit www.pgcalc.com.



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