

Calculations and Proposals

The best planned giving programs don't just have the best people.
They have the best software and advice.



Calculations and Proposals

Planned Giving Manager is the software of choice for planned giving programs around the country.



A wealth of functionality

With *Planned Giving Manager*, you can:

- ▶ Calculate deductions for all gift vehicles
- ▶ Prepare customized proposals for every step in the gift planning process
- ▶ Generate side-by-side comparisons of gift plans
- ▶ Compare gifts funded with different principal amounts on one page
- ▶ Apply different assumptions to each gift option
- ▶ Create compelling “How it works” and “Numbers” diagrams
- ▶ Project wealth replacement benefits
- ▶ Calculate present value
- ▶ Analyze estate plans for married couples, surviving spouses, or single persons
- ▶ Compute gift taxes
- ▶ Provide reference material for your donors’ advisors
- ▶ Generate disclosure statements and gift annuity agreements for all 50 states
- ▶ Access superb online [Help](#)

More than 25 years ago, a calculation and proposal software package for planned giving was developed at Harvard University thanks in part to the work of people who would go on to found PG Calc.

PG Calc brought this knowledge to the charitable community in 1985 with the introduction of *Planned Giving Manager (PGM)*, and it quickly became the standard. Gift planners instantly recognized the impact of its functionality; calculations that once took them 20 minutes to do with hand calculators could be done in seconds on their PCs.

Today, many updates later, *PGM* is still the software of choice for the majority of planned giving programs around the country.

Become a better gift planner with *PGM*

We know how much you have on your plate as a gift planner. *PGM* enhances your productivity by giving you the capability to calculate, explain, compare, and promote planned gifts, and to work more effectively with your donors and their advisors.

Calculations to match the situation

With *PGM*, it’s easy to calculate a deduction in seconds even if you’re on the phone with a potential donor.

PGM also allows you to execute a host of more complex tasks with almost equal ease. In fact, it couldn’t be simpler to build the documents you need to educate your donors about the best gift plans to meet their goals.

Presentations designed to inform and persuade

There’s a *PGM* presentation for every stage in the gift planning process, including proposal letters, gift descriptions, gift acknowledgements, and more.

And *PGM* integrates seamlessly with Microsoft Office. That means you can export your presentations to Microsoft *Word*® for editing and e-mailing, to *Excel*® to create sophisticated graphics, and to *PowerPoint*® to make slides. You can even import proposals in Blackbaud’s *The Raiser’s Edge*® and send completed gifts directly to our own gift administration software, *GiftWrap*.



Superb support is a constant

As a *PGM* user, you can count on the outstanding support you'd expect from a company as highly regarded for its customer service as PG Calc.

Because good gift planning requires that you stay current, we make sure that you're kept up-to-date with the latest tax laws, comply with state regulations, and understand new developments in planned giving. Timely software updates are part of the package, as are our quarterly PG Calc-U-Letters, e-Rate monthly newsletters, and pertinent e-mail alerts.

And our toll-free Help line is yours for the using. You can't imagine how much help is available to you from our planned giving experts in customer support.

Compact and effective alternatives

For programs that don't require the broad functionality of *PGM*, we offer two tailored versions of the product. *Mini Manager* and *Gift Annuity Manager* provide many of the same outstanding gift planning features and come with the same expert client support as *PGM*, but may be more appropriate for programs whose planned giving activities are more narrowly defined.

Proposal and gift design services

PG Calc commonly provides detailed proposals for charitable organizations or professional advisors needing assistance with the design of a specific gift plan, an unusual asset, or a complete financial illustration. On a per-case basis, we can provide simple calculations as needed or as robust a design as you require for a specific gift, including gift description, summary chart, detailed chart with IRS code citations, cash flow analysis, rate of return analysis, and schedule of taxation for gift annuities.

Multimedia proposals

Put PG Calc's *GiftStory* software on your website and let your visitors create engaging multimedia presentations on common planned gift situations that will motivate them to contact you to learn more. You also can use *GiftStory* yourself to prepare personalized multimedia presentations to e-mail to prospects or share in person.



For more information
about PG Calc

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PG Calc

At PG Calc, our mission is to help fulfill yours.



Choose the version that works best for you.

Features	Planned Giving Manager	Mini Manager	Gift Annuity Manager
Gift annuity proposals	■	■	■
DemoClips	■	■	■
Gift descriptions	■	■	■
Annuity agreements	■	■	■
Export to MS Office	■	■	■
Export to GiftWrap	■	■	■
The Raiser's Edge® compatibility	■	■	■
Includes all gift types	■	■	
Gift comparison charts	■	■	
Compare gift amounts	■	■	
First-year analysis	■	■	
Templates of gift plans	■	■	
Diagrams and graphs	■	■	
Multi-year projections	■		
Investments modeling	■		
Wealth replacement	■		
Estate plan modeling	■		
Retirement plan gifts	■		
Build-up gifts	■		
Lead trust projections	■		

For more information and to discuss options, we invite you to call toll-free 888-497-4970 or visit www.pgcalc.com.



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