

# Education Services

The more you know about planned giving  
the better gift planner you can become.



# Education Services

What we know about planned giving fills dozens of seminars and webinars every year.



## Educational Services

Through a combination of delivery methods and courses, PG Calc's educational curriculum seeks to:

- ▶ Help you master gift planning concepts that are essential to your success
- ▶ Teach you how to use our software and tools easily and effectively
- ▶ Explain the concepts behind gift calculations
- ▶ Enable you to discuss basic and complex planned giving topics with fluency
- ▶ Teach you the tools and techniques of effective gift administration
- ▶ Enable your organization to close more planned gifts

Planned giving is full of complexities. Newcomers often find it an overwhelming discipline, and even experienced gift planners are challenged to stay current with new developments. In fact, planned giving professionals with long-term relationships with PG Calc call on us almost as often as new gift planners, seeking our expertise in everything from gift design and tax law changes to compliance reporting and gift administration.

We know that many fundraisers do planned giving for only part of their time. But in our opinion, it doesn't matter how your day is divided. What matters is that you have the skills required to do every aspect of your job well.

The many educational opportunities PG Calc offers have two objectives. First, we want you to be the most informed, skillful, confident gift planner you can be. This is true whether you're a development officer who wants to be able to identify planned gift prospects, a planned giving officer who wants to master planned giving, or someone whose educational needs are somewhere in between. Second, we know our software can contribute significantly to your planned giving program, and we want you to become expert in its use.

### Educational programs that address your interests and concerns

Our educational offerings range in level from introductory to expert. And they're available to you in formats that vary by class size, location, and method of delivery.

We conduct **group training seminars** in locations around the country. These case-based sessions are designed to help you learn more about gift planning and administration techniques and become more familiar with our software. You'll learn such essentials as how to create powerful gift illustrations that will motivate and educate your donors, as well as how to forecast the value of gifts you've already received. If you're heading to a conference, keep an eye out for training dates on our website, [www.pgcalc.com](http://www.pgcalc.com).

If you prefer Internet learning, we have that, too. Like many of our clients, you'll find our interactive **Webinars** a convenient, affordable, and effective environment in which to enhance your planned giving skills and the skills of your team. Our monthly Webinars focus on areas as varied as tax basics, state gift annuity regulations, lead trusts, marketing, and more. Visit [www.pgcalc.com](http://www.pgcalc.com) for Webinar descriptions, presenter biographies, schedule, and registration information.



We also provide **on-site custom training** tailored to your organization's needs. We work with you to create customized classes on the subjects of your choice. Particularly effective for Board or large staff training, this method is very cost effective because you can invite as many individuals to the training as you like for the same fixed rate.

Registered users of our software are entitled to **unlimited telephone** and **e-mail support** from our expert Client Services team. And our support isn't just technical in nature. Whether you need help modeling a gift, running a report, or solving any of a host of other planned giving problems, you can always phone our toll-free Help line or e-mail us to get the assistance you need.

We've published two extensive reference works we are confident will enhance your planned giving library. Authoritative in its coverage of gift annuities, ***Charitable Gift Annuities: The Complete Resource Manual*** has become an indispensable guide for hundreds of gift annuity programs. The manual addresses the establishment, administration, and marketing of a gift annuity program and has guided many organizations to first-rate gift annuity programs. ***Planned Giving for Canadians*** has been the leading resource for gift planning north of the border since 1994. Make it part of your collection if your charity is a potential beneficiary of planned gifts by Canadian supporters.

We also encourage you to explore the **Help** systems in *Planned Giving Manager* and *GiftWrap*. We've packed decades of planned giving know-how and experience there, keep it constantly updated, and we're particularly proud of the content.

### **Knowledge on our website**

If you need information about various components of the gift planning process, one of the best places to look is [www.pgcalc.com](http://www.pgcalc.com). Our online **Knowledge Base** has a depth of information about subjects as varied as general gift planning, charitable gift annuities, charitable remainder trusts, tax law analysis, and much more.

While the complexities of planned giving may seem daunting to you, it is familiar territory to us. Let our experience be your guide.



For more information  
about PG Calc

[888-474-2252](tel:888-474-2252)

[www.pgcalc.com](http://www.pgcalc.com)

[education@pgcalc.com](mailto:education@pgcalc.com)

# PG Calc

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



**PG Calc Training Specialty Areas** The following topics are representative of PG Calc's educational options:

### Planned Giving Essentials

- ▶ Bequests and Other Simple Estate Gifts
- ▶ Retirement Planning Using Life Income Gifts
- ▶ Recognizing Planned Giving Potential in Donors
- ▶ Satisfying Charitable Objectives and Preserving Wealth for Heirs
- ▶ Planned Gifts that Appeal to Younger Donors
- ▶ Gift Options When the Donor's Wealth Is in an IRA
- ▶ Gift Planning Strategies in a Down Economy
- ▶ Working with Boards and Advisory Committees
- ▶ Key Elements of Outstanding Planned Gift Administration
- ▶ Building Endowment
- ▶ Converting Deferred Gifts to Current Gifts
- ▶ How to Be a Wise Philanthropist
- ▶ Ethical and Liability Issues in Gift Planning
- ▶ Advanced Planned Giving Techniques

### Marketing

- ▶ Marketing Planned Gifts
- ▶ Marketing Gift Annuities

### Essential Tax Knowledge

- ▶ Taxation Basics for Gift Planners
- ▶ Estate and Gift Taxation for Gift Planners
- ▶ Maximizing Wealth Transfer to Heirs
- ▶ Reducing Gift Taxes

### Possible Funding Assets

- ▶ Gifts of Tangible Personal Property and other Unusual Assets
- ▶ Gifts of Life Insurance
- ▶ Gifts Opportunities with Real Estate
- ▶ Gifts of Retirement Plan Assets
- ▶ Gifts of Closely-Held Business Assets

### Charitable Remainder Trusts

- ▶ Charitable Remainder Trust Essentials
- ▶ Charitable Remainder Trust Taxation
- ▶ Advanced Planning with Charitable Remainder Trusts

### Charitable Lead Trusts

- ▶ Lead Trusts: A Golden Opportunity
- ▶ Donor Situations Where a Charitable Lead Trust Can Be a Good Solution
- ▶ Testamentary Lead Trust
- ▶ Projecting the Benefits of Charitable Lead Trusts
- ▶ Transfer Tax Benefits of Charitable Lead Trusts
- ▶ Charitable Lead Trust Taxation
- ▶ Advanced Planning with Charitable Lead Trusts

### Gift Annuities

- ▶ Gift Annuity Essentials
- ▶ Advanced Planning with Gift Annuities
- ▶ Maximizing the Benefits of your Planned Giving Program
- ▶ Operating an Effective Gift Annuity Program
- ▶ Gift Annuities – Compliance with Federal and State Regulations
- ▶ Gift Annuity Administration
- ▶ Structuring a Gift Annuity Program
- ▶ Using Deferred Gift Annuities for Supplemental Retirement Income

Become a better gift planner today. Current schedules, logistics, pricing, and registration are available online at [www.pgcalc.com](http://www.pgcalc.com). We are always happy to hear from you at 888-474-2252 or [education@pgcalc.com](mailto:education@pgcalc.com).



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