

Lead Generation Tools

Engaging your prospects moves them that much closer to making a gift.



Lead Generation Tools

Tools designed to help you move prospects from engagement to commitment



What they're saying

“Adding an interactive feature like the planned giving calculator has made our website a much more useful and interesting destination for potential donors and affiliated professionals alike. Given the increasing number of Web-savvy alumni amongst our constituents, it’s nice to know that we are providing them with a critical tool for helping to evaluate various planned gift options.”

Chris Yates, Director of Planned Giving, Stanford University

“By using *BatchCalcs*, we saved two days of manually calculating the numbers for our direct mail letter. We will definitely use the *BatchCalcs* service again.”

Michael Pohlmann, Senior Gift Planning Officer, American Civil Liberties Union Foundation

From the inception of PG Calc, we’ve been focused on helping our clients communicate with their donors and prospects. Our industry-leading software platform, *Planned Giving Manager*, continues to provide non-profit organizations the means to generate gift proposals.

On the other hand, different efforts are required to engage prospects earlier in the cultivation process – such as when they come to your website to learn more about your organization or when you capture their attention in a mailing. With those kinds of activities in mind, we’d like to introduce you to our suite of lead generation tools, including *BatchCalcs*, *GiftStory*, *GiftCalcs* and our powerful interactive engagement tool, *GiftGuide*.

These tools are designed to help you raise awareness of planned giving, educate prospects in a way that’s enjoyable to them, and illustrate planned giving benefits on a personal level.

***BatchCalcs*: personalized mailings**

Our *BatchCalcs* service adds impact to your planned giving mailings by including personalized planned gift calculations in each direct postal or email solicitation. *BatchCalcs* allows you to add basic planned gift calculations for all common life income plans, including gift annuities, deferred gift annuities, and charitable lead trusts. If you want to include additional information for each prospect, such as a target gift amount, you can do that, too.

***GiftStory*: multimedia presentations for your website**

GiftStory is a web-based suite of presentations that helps donors learn about planned gifts in plain language, much as if you were there to provide the information yourself. Prospects enter some basic information and watch a multimedia movie with illustrations, narration, and slides. Titles include “Give and Get Income” and “Meet Your Goals with a Bequest to Charity.” *GiftStory*’s storytelling approach combined with color, sound, and motion provide a uniquely engaging experience for your prospects.

***GiftCalcs*: an interactive calculator for your website**

GiftCalcs is a web calculator that provides deduction calculations to your online prospects for all of the types of planned gifts your organization accepts. The calculator gives prospects an interactive way to explore gift benefits without



pressure, helping them become comfortable with the concepts and moving them closer to making a gift once an actual dialogue with you begins. Because metrics matter, you can collect prospect contact information from *GiftCalcs* if you decide to, as well as monitor site activity, review site activity reports, and keep track of visitors.

***GiftGuide*: heightened interactivity for your website**

GiftGuide is a powerful educational tool that provides individual gift recommendations based on prospects' specific situations and goals. Visitors to your website identify their financial and charitable goals through an interactive Q&A sequence and choose from up to three different ways to learn more about the recommended gift plan.

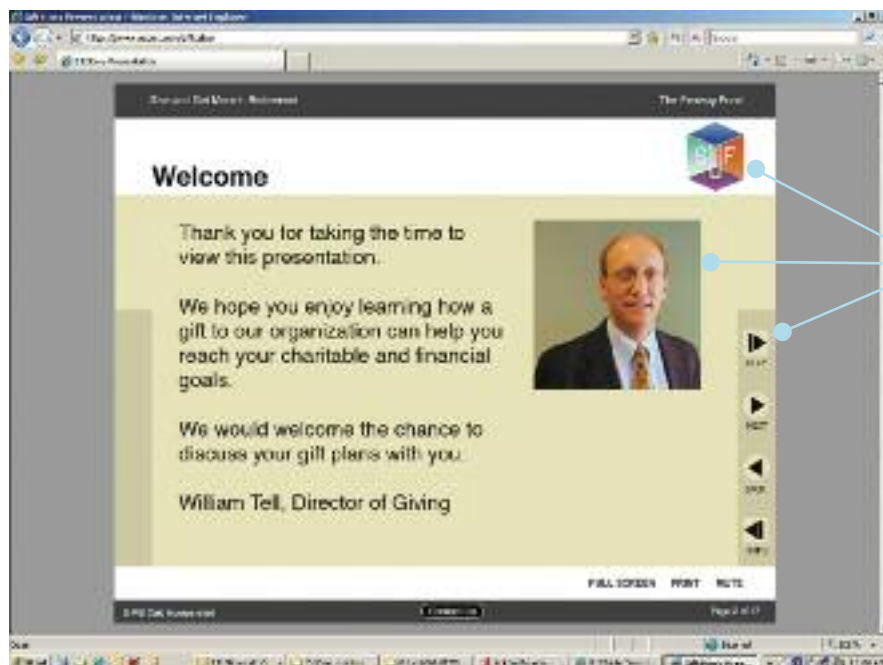
GiftStory and *GiftCalcs* are both bundled into *GiftGuide*. Prospects can investigate a particular gift plan by calculating their specific life income benefits and then watching engaging, multimedia movies about the plans that interest them. Or they can opt simply to read more about either the recommended gift vehicle or the considerations that are important when making a gift of a particular asset. The gift descriptions contained in *GiftGuide* offer technically accurate information conveyed in clear, simple language that matches your donor's point of view.



Improve your marketing prowess

PG Calc offers marketing consulting services to non-profit organizations.

PG Calc marketing consultants can provide well-developed insight into and practical advice about everything from strategic marketing plan development and tactical implementations to lead generation techniques and the establishment of metrics with which to gauge your success.



Our web-based lead generation tools can be customized to better reflect your organization. For example, this slide from GiftStory demonstrates customization opportunities in the logo, image, audio, and introductory text.

PG Calc

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



PG Calc’s lead generation tools allow you to check off some of the “must-haves” for your organization’s website:

- Provide visitors a path to a desired response
- Pursue a budget-friendly, effective way to cultivate leads
- Offer compelling, high quality content
- Encourage prospects and advisors to learn in their own style
- Maintain the look of your site for a consistent visual experience
- Provide accurate up-to-date information with automatic updates that cover you in the ever-changing world of gift planning (IRS discount rate changes, ACGA gift annuity rate changes, other tax changes)



Choose the tools that make sense for your lead generation needs.

Feature	GiftCalcs	GiftStory	GiftGuide	BatchCalcs
Client Center that allows customization to match your website, gift acceptance policies, etc.	■	■	■	
Web calculator that provides deduction calculations for all planned gift types	■		■	
Online multimedia presentations to educate your prospects on gift plan alternatives		■	■	
Multimedia presentations for email or download to laptop or CD		■	■	
Descriptions for different types of gifts and assets			■	
Gift recommendations from online Q&A session			■	
Contact us request information page			■	
Planned giving mailings made more effective by including personalized calculations				■

For more information and to discuss our various lead generation solutions, we invite you to call toll-free 888-497-4970 or visit www.pgcalc.com.



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