

*Invested in your mission*



PG Calc has supported the missions of more than 5,000 charitable organizations in education, healthcare, religion, the arts, social services, and more.

# At PG Calc

our mission is to help you fulfill yours.



PG Calc is one of the most respected companies in planned giving, and we have our many clients to thank for that.

Beginning with the introduction of *Planned Giving Manager* in 1985, we have steadily grown and enhanced our capabilities. Today, we offer a comprehensive array of planned giving products and services in the areas of:

- ▶ Consulting
- ▶ Marketing
- ▶ Calculation and Proposal Software
- ▶ Education
- ▶ Gift Administration

## Committed to excellence

Since the day we were founded, we have sought to achieve excellence in everything we do. Commitment of this kind has helped us establish trust with thousands of charitable organizations of every size and category, including education, healthcare, religion, the arts, social services, and more. At the same time, the confidence they have in us is why many of America's largest asset managers and charities rely on PG Calc to help them administer tens of thousands of gift annuities and pooled income fund gifts.

Contributing to the success of the organizations we serve is our mission. How can we support yours?

i	PG Calc milestones
1982	Founders begin working in Harvard's Planned Giving Office
1985	PG Calc is founded in Cambridge, MA and <i>Planned Giving Manager 1.0</i> is released
1987	<i>Gift Annuity Management Program</i> and <i>Pooled Fund Organizer</i> are introduced
1991	PG Calc offers its first group training session
1994	PG Calc welcomes its 1,000th client
1995	The PG Calc web site is launched
1996	The first Windows version of PGM is released
1999	PG Calc inaugurates <i>GiftCalcs</i> , the online gift calculation service
2002	PG Calc launches <i>Gift Administration Services</i>
2005	PG Calc acquires <i>Planned Giving Services</i>
2007	PG Calc Webinars are launched
2008	PG Calc President Gary Pforzheimer is named chair-elect of NCPG

# Consulting

We serve organizations with sophisticated planned giving programs, those that have never had a program, and everything in between.



Regardless of the stage of your planned giving program, we can help you define, establish, and reach your goals.

Frequent speakers at industry events and the authors of countless articles and publications, PG Calc's consultants have contributed to planned giving in ways no other group of professionals can match. Collectively, we've worked with thousands of planned giving staff members and their donors to close countless dollars in gifts.

## **New and growing programs**

We provide services that are key to assisting you in building a solid foundation for a sound, long-term planned giving program, including securing Board approval, establishing policies, and training your staff.

## **Established programs**

Planned giving programs run smoothly when time-tested policies and procedures are in place, understood, and adhered to; when roles and responsibilities are well-defined; and when the promotion of planned gifts to your constituents is strategic and executed effectively.

Regardless of how mature your program is, we guarantee we can improve it by auditing your existing processes and providing services in the following areas:

- ▶ **Training your Board and staff members**
- ▶ **Evaluating donor potential**
- ▶ **Documenting policies and procedures**
- ▶ **Escorting you through the gift annuity state registration process**
- ▶ **Helping you develop a strategic approach to marketing**
- ▶ **Improving your prospecting activities**
- ▶ **Facilitating gifts and working with your asset managers**
- ▶ **Enhancing your gift administration capabilities**

Our consultants have contributed to planned giving in ways no other group of professionals can match, working with thousands of planned giving staff members and their donors to close countless dollars in gifts.

# Marketing

Marketing is an indispensable part of a successful planned giving program. Not that we need to tell you that.



## PG Calc lead generation tools include:

**GiftCalcs** > a web-based calculator that provides deduction calculations for all planned gift types

**GiftStory** > web-based multimedia presentations to educate your prospects on gift plan alternatives

**GiftGuide** > interactive web tools that support online interactions with your potential donors

**BatchCalcs** > an automated way to make your planned giving mailings more effective by including personalized calculations

It's one thing to have planned giving knowledge. These days, though, having marketing know-how is equally indispensable to program success. Strategic marketing planning, lead generation, and prospecting skills are undeniable contributors to a planned giving program that delivers results.

PG Calc can strengthen your marketing efforts in a variety of ways. Our unique combination of marketing proficiency and planned giving expertise has enabled us to develop a wide range of services and tools that can help you find new prospects and move existing ones closer to a gift.

## Marketing strategy

You've got to start with a plan. PG Calc's strategic marketing consultants will help you define your marketing objectives and identify the tactics and tools you need to achieve them over a specific period of time. You can also take advantage of our in-depth evaluation of your current marketing efforts to ensure you are meeting your marketing needs both effectively and efficiently.

## Lead generation

Raising awareness of planned giving, attracting the attention of potential donors, and moving your prospects closer to making a gift are key marketing objectives. Our lead generation tools are designed to help you do all of the above. And we'll show you how to incorporate them into an integrated marketing effort.

# Calculations and Proposals

Planned Giving Manager has been the leading gift planning software package for over two decades. And it just keeps getting better.



PG Calc introduced *Planned Giving Manager (PGM)* in 1985, and it is still the preeminent software package for planned gift calculations and proposals.

## Expertise at your fingertips

As a *PGM* client, you can count on timely tax updates and analysis. You also get access to an online **Help** system that's a virtual encyclopedia of planned giving information. Perhaps best of all, you enjoy unlimited support from the experts at PG Calc. With *PGM*, you can:

- ▶ Calculate deductions for all gift vehicles
- ▶ Prepare attractive, customized proposals and presentations
- ▶ Create side-by-side comparisons of gift types and amounts
- ▶ Provide informative reference material for use by your donors' advisors
- ▶ Generate gift annuity agreements for all 50 states

We also offer two compact versions of the product to meet the needs of smaller programs. *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 in more tailored configurations.

If you aren't ready to purchase software, we can take care of your calculation needs as they come up, working with you to design and illustrate gifts that will support your prospects' financial and charitable objectives.

You'll also want to consider *GiftStory*. Use this online software to create engaging multimedia proposals on common planned gift situations that you can e-mail to your prospects or share with them in person. *GiftStory* presentations can include a custom recorded message about your organization, and, where appropriate, display the specific benefits of a planned gift based on your prospect's personal information.



## Calculation products and services from PG Calc

### Calculation software

- ▶ *Planned Giving Manager*
- ▶ *Mini Manager*
- ▶ *Gift Annuity Manager*

### Multimedia proposals

- ▶ *GiftStory*

### Proposals service

### Gift design and illustration service



# Education

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



## Representative educational topics

- ▶ Planned Giving Essentials
- ▶ Marketing
- ▶ Essential Tax Knowledge
- ▶ Possible Funding Assets
- ▶ Charitable Remainder Trusts
- ▶ Charitable Lead Trusts
- ▶ Gift Annuities

We offer a host of educational programs designed to help gift planners and their teams grow their base of knowledge, increase their confidence, and deliver superior results.

### The education you need any way you need it

We recognize that investing in your professional education contributes to your success as a gift planner. We also know that when you're learning, you're taking time away from either talking to donors, strategizing about a particular gift, or closing your latest gift annuity. Our educational options provide the flexibility you need to find the time, budget, and support to continue becoming a better gift planner.

Join us for any of the following:

- ▶ Webinars
- ▶ Group training sessions
- ▶ On-site custom training
- ▶ Seminars
- ▶ Unlimited phone and e-mail support for our registered software users
- ▶ Free software orientations



*“The PG Calc workshop was a genuine pleasure to attend. Two very full days replete with basic and more advanced ‘how-to’s,’ and meaningful, substantiating theory behind gift methods and illustrations. Others in attendance agreed that the high quality of PG Calc services, training, and great help are a hallmark for all planned giving service organizations.”*

Garry E. Malone, Assistant Vice President for Philanthropy and Alumni Affairs  
The Research Foundation of NY



# Gift Administration

Administering completed gifts can be one of the more difficult parts of a planned giving program. Or one of the easiest.



PG Calc has the products, services, and experience to ensure that you meet the numerous challenges associated with gift administration.

## Software you can count on

*GiftWrap* allows you to perform any of the following functions:

- ▶ Track donor, beneficiary, and gift information
- ▶ Send accurate, on-time payments and tax forms
- ▶ Monitor expectancies and cash flow projections
- ▶ Track the value of gift annuity contracts
- ▶ Perform FASB 116/117 liability calculations
- ▶ Compute state gift annuity reserve requirements

This comprehensive functionality is why many of the largest financial institutions in the country use *GiftWrap* to help them serve their non-profit clients.

## Expertise you can depend on

If you'd rather outsource the gift administration process, PG Calc is the company to turn to. Working with your asset manager, we provide back-office accounting services for gift annuities, pooled income funds, and trusts, including maintaining records, producing beneficiary payments and tax forms, and providing reports documenting the process.

We can also work with you to do just your compliance reporting, as well as audit and evaluate your current gift administration procedures.



### Gift administration products and services from PG Calc

#### Administration software

- ▶ *GiftWrap*
- ▶ *Pooled Fund Organizer*

#### Administration services

- ▶ Maintaining and tracking data
- ▶ Payment processing for CGAs, PIFs, and CRTs
- ▶ Tax form preparation for CGAs, PIFs, and CRTs
- ▶ Cash flow reports and individual market values for all planned gifts

#### Compliance services

- ▶ FASB 116/117 liability reports
- ▶ State gift annuity reserve reports

#### Risk analysis

- ▶ Gift annuities

*“When we began our search for a firm that could handle the administrative management of our new Charitable Gift Annuity Program, we had three important criteria: accuracy, reliability, and a sense they could ensure relationships with our donors would continue to meet our standards of excellence. PG Calc had it all. PG Calc brings a new level to customer service standards: Platinum.”*

Karen Gaffney, Vice President  
Al Sigl Center



# Our commitment

We understand how much your mission drives you.



Whether you want to find out more about our consulting, marketing, and educational services; our industry-leading gift planning software tools; or our comprehensive gift administration capabilities, we welcome your call at 888-497-4970. Or e-mail us at [info@pgcalc.com](mailto:info@pgcalc.com).

For more than 20 years, we've been driven by a single mission – to support and enhance the missions of our clients.

We welcome the opportunity to do the same for you.

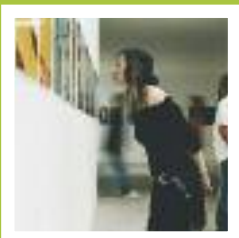


For more information  
about PG Calc

[888-497-4970](tel:888-497-4970)

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

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



*“PG Calc has been a key partner in the growth of our planned giving program. Its products and services are well aligned with the commitment to excellence and user-friendliness that guide our efforts with donors. With PG Calc, we are confident in our ability to meet the gold standard that our donors count on us to deliver.”*

**Susan Veroff, Director, Planned Giving  
Museum of Fine Arts, Boston**

# What we do

More institutions look to us for support in planned giving because we offer more of it.

i	Consulting	Marketing	Calculations and Proposals	Education	Gift Administration
	<ul style="list-style-type: none"> <li>▶ Starting a program</li> <li>▶ Policies and procedures</li> <li>▶ State registration</li> <li>▶ Marketing</li> <li>▶ Prospecting</li> <li>▶ Gift closing</li> <li>▶ Gift administration</li> <li>▶ Program evaluation</li> </ul>	<ul style="list-style-type: none"> <li>▶ Marketing strategy</li> <li>▶ Lead generation</li> <li>▶ Direct marketing</li> </ul>	<ul style="list-style-type: none"> <li>▶ Calculation software</li> <li>▶ Multimedia proposals</li> <li>▶ Proposal service</li> <li>▶ Gift design and illustration</li> </ul>	<ul style="list-style-type: none"> <li>▶ Group training</li> <li>▶ Webinars</li> <li>▶ Custom education</li> <li>▶ Publications</li> <li>▶ Seminars</li> <li>▶ Knowledge Base</li> </ul>	<ul style="list-style-type: none"> <li>▶ Administration software</li> <li>▶ Administration services</li> <li>▶ Compliance services</li> <li>▶ Risk analysis</li> </ul>
<p>For more information, call us toll-free at 888-497-4970 or visit <a href="http://www.pgcalc.com">www.pgcalc.com</a>.                      For free trial software, e-mail us at <a href="mailto:info@pgcalc.com">info@pgcalc.com</a>.</p>					

*“Planned giving was an entirely new area of fundraising for me just six years ago, and if it hadn’t been for PG Calc, I probably wouldn’t be in it today. Your software does so much of the work for gift preparation and comparisons that I could jump in with both feet and concentrate on the donors rather than the math.”*

Pat Thornton, Planned Giving Coordinator  
 Southern Poverty Law Center





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