

# Web-Based GiftWrap 4.0

A unique combination of power and flexibility



*GiftWrap 4.0* is a Web-based application hosted by PG Calc that brings even more analytical capability to your gift administration program.

## Web-based Architecture

- Eliminates installation hassles and decreases technical support
- Updates and maintenance are provided by PG Calc automatically
- Has the familiar *GiftWrap* look and feel in the browser window
- Makes use of standard browser interface and Web best practices
- Supports read-only remote access for affiliates and clients

## World-Class Security

- Architecture with a multi-level approach to data security, advanced security features, and two levels of data encryption
- Best in class, SAS 70 Type II compliant, high-capacity hosting infrastructure with state of the art monitoring, redundant power, and comprehensive physical security
- Role-based user privileges for enhanced security, greater flexibility, increased efficiency, and reduced errors
- New flexible data access allows users in service provider environments to be granted access to only a subset of all charities

## New Modules

- **Advanced Analysis** provides expanded analysis tools for remainder expectancies, years to exhaustion, historical gift values, and valuable program statistics reports
- **Document Storage** stores contracts, trust instruments, and other documents and associates them with specific Person, Gift, Org, PIF and Charity entities
- **Workflow** enables electronic task flow management, replacing paper and spreadsheets with a centralized online resource to track task completions, workflow approvals, and client change requests

## More Power

*GiftWrap 4.0* is your comprehensive tool for gift data management, reporting, and now enhanced program analysis. With *GiftWrap*, you can manage risk more effectively, ensuring the financial health of your planned giving program.

## Enhanced Reporting

*GiftWrap 4.0* brings more reporting functionality and greater reporting flexibility. Check out the **Advanced Analysis** module for the most robust reporting options.

## Greater Flexibility

Need to track seed money for your annuity fund? Want to print checks for remainder beneficiaries? Want to track annuity accounts by state? *GiftWrap 4.0* can do that!

## Field Tested

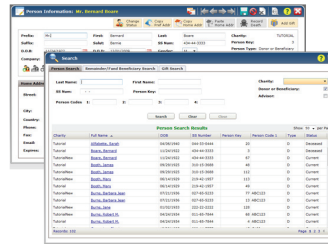
*GiftWrap 4.0* has been in active use by us for over a year, and since its release in May 2010, significant numbers of clients have made the switch and are successfully using it for production.



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## Administration of Gift Annuities

- Supports multiple gift annuity investment pools per organization
- Enables reporting reserves separately by state-segregated annuity accounts and running CashTrac on a per annuity pool basis
- Tracks seed money in a gift annuity fund
- Performs gift-level allocation of Interest/Dividends, Fees/Expenses, and Gain/Loss for each period
- Stores historical reserve amounts and offers several calculation options for handling negative annuity balances



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## Designation and Terminations Enhancements

- Offers new fields help reconcile proper crediting of new and terminated gifts
- Adds ability to specify a restriction when associating a gift with a Designation
- Groups by Designation and/or Restrictions on Projected Remainder Amounts and Gift Summary reports
- Supports Remainder Beneficiaries at the Organization, Designation, and Pooled Income Fund levels, and can produce final distribution checks

## Payment Enhancements

- Payment snapshots provide clearer and more secure auditing and reporting of issued payments
- Individual payments can be tracked more precisely
- New ability to mark a payment as 'Stop Payment'
- New 'payment status' field to help manage payment data including new ability to indicate 'pending return'
- Expanded handling of EFT payments for gift types CGA and OTH
- Last recorded check number stored and displayed on payment form

## Reporting and Analysis

- Fully integrated custom reports, each based on a system report
- No limit to the number of custom versions of a system report
- New functionality allows easy creation of custom filters, stored for easy access in a Custom Filter menu right on the report interface
- A default set of custom filters included in the application
- Ability to group organizations in a way that makes sense for your operation facilitates reporting and overall administration
- Selection by a specific key, a list of keys or a range of keys for increased reporting flexibility
- Expanded suppression functionality, allows you to show or suppress various detail levels of report output

