



BatchCalcs Service Client Data Form

Please complete both pages of this form to provide PG Calc's BatchCalcs Service with the information we need to process your data. Fax the completed form to 617-497-4974.

Contact information: Name: _____ Phone: _____
Organization: _____

Data file

I will provide the data in the following format: Comma-delimited text file (*.csv)
 Tab-delimited text file (*.txt)
 Excel file (*.xls)

Data source: GiftWrap The Raiser's Edge Other Database

Approximate number of records expected in file: _____

Preferred method of file transfer: E-mail attachment Post to FTP site Mail CD

Required fields in each record (mark the appropriate choice on each line)

ID # (numbers only, no alpha): In file PG Calc should assign
(file must provide name or other identifier)

Beneficiary birthdate(s) or age(s): Birthdates Ages

Optional fields (for each field, either indicate that your file will include values or tell us the value to assume)

Gift type: In file Assume: Charitable gift annuity (CGA)
 Deferred gift annuity (DGA)
 Charitable remainder unitrust (CRU)
 Charitable remainder annuity trust (CRAT)
 Pooled income fund (PIF)
 Charitable lead unitrust (CLU)
 Charitable lead annuity trust (CLAT)
 Retained life estate (RLE)

Gift amount: In file Assume: _____

Cost basis: In file Assume: _____

Gift date: In file Assume: _____

Payout rate: In file Assume: _____ / _____ Look up in table (CGAs, DGAs only)

Annuity rate table (CGAs, DGAs only): Use current ACGA rates
 Use past ACGA rates; Year _____
 Use custom rate table

Date of first payment (DGAs only): In file Assume: _____

Donor/annuitant relationship:
(CGAs, DGAs funded with appreciated assets only)
 In file Assume for 2-life: annuitant #1 is also the donor
 annuitant #2 is also the donor
 joint annuitants donate joint assets
 neither annuitant is a donor
Assume for 1-life: annuitant is also the donor
 annuitant is not the donor

Payment frequency: In file Assume: A S Q M
 Payment timing: In file Assume: End (recommended) Beginning
 IRS discount rate: In file Assume: _____
 Term type (CRTs, CLTs, RLEs only): In file Assume: Lives Fixed Term
 Term in years (CRTs, CLTs, RLEs only): In file Assume: _____
 Annual investment return % In file Assume: _____ Not applicable (no projected #s)
 Value of building(s) (RLEs only): In file Assume: _____
 Salvage value of bldg(s) (RLEs only): In file Assume: _____
 Est. useful life of bldg(s) (RLEs only): In file Assume: _____

Indicate the values you want added to each record

Available for all gift types:

- Charitable deduction
- Annual payment amount
- Beneficiary age(s) on birth date nearest gift date (requires birth date(s))
- Donor's total capital gain in gift asset
- Projected total payments
- Projected amount remaining for charity
- Projected years gift will last

Available for CGAs and DGAs only:

- Amount of first payment
- Ordinary income portion of annuity
- Capital gain portion of annuity
- Tax-free portion of annuity
- # of years tax-free portion paid
- Total reportable capital gain
- # of years capital gain reported
- Exclusion ratio (portion of annuity that will be tax-free or capital gain income for many years)

Available for certain gift types only (indicated in parentheses):

- Beneficiary ages on date of first payment (DGAs only)
- Minimum qualifying deduction (CRTs, CGAs, and DGAs only)
- Probability of principal exhaustion (CRATs only)
- Value of land portion of gift asset (RLEs only)

Mark additional values you will include in file (required if PG Calc will create and send mailing)

- Prospect name Salutation
- Address line 1
- Address line 2
- City State Zip
- Prospect e-mail address (if we are sending by e-mail)
- Organization Name
- Other Please specify: _____

Fulfillment of mailing

You want PG Calc to fulfill your mailing:

Yes No (skip remaining questions)

If Yes, your mailing will be:

Printed Electronic (skip remaining questions)

If *Printed*, stationery will be:

Sent to PG Calc

Printed by PG Calc using artwork sent by your organization

Blank stock