



Top Ten Most Frequently Asked Client Questions for 2017

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By Jeffrey Frye, Senior Client Services Advisor, PG Calc

As the year draws to a close, we thought it might be useful to share the most popular client questions of 2017 with you.

10. In *Planned Giving Manager (PGM)*, how do I calculate the present value of a bequest we are expecting from a donor?

Answer: Good news - we have a specific tool for that! Simply click on “Tools” at the top of the screen and you’ll get a drop-down list; from there, select Present Value of Future Bequest and walk through the input process. If you are uncertain about any of the criteria, click on the blank space and then click on the question mark at the top of the screen to read context-specific Help on that question. *[Tina Yelle, Director of Client Services]*

9. In *PGM Anywhere*, how do I set up my charity’s information? Will it allow me to set up my charity’s logo as a custom icon?

Answer: In *PGM Anywhere*, click on “Customize” in the top right corner of the screen, then click on the Edit icon to the left of Organization Name. There are several different categories of information you can set up for your organization; the first one is General. Click on a category to answer all the questions in it. You can add your charity’s logo in the General category. When done, click Done at the bottom of any category to save all your changes. *[Christopher Lee, Client Services Advisor]*

8. In *GiftWrap*, how do I start using the CashTrac function? We need to track the individual market values for all of our charitable gift annuities.

Answer: CashTrac is a powerful function in *GiftWrap* that is essential for maintaining individual gift annuity market values. It is available in the Actions menu. This feature is easy to maintain going forward, but if you've never used it, getting started can be tricky, and we invite you to give us a call. The most important aspect is having all of the aggregate market values of your gift annuity investment pool available for as far back as you wish to go. *[Jeffrey Frye, Senior Client Services Advisor]*

7. In *PGM*, What investment assumptions should I use in modeling a charitable remainder trust?

Answer: There are no specific right or wrong numbers to use when running long-term projections, but you should have a general understanding of who will be serving as trustee and who will be managing the investments of the trust. If those parties are known at the outset, you should consult with them to determine the correct numbers to use in any projections. If those aspects are unknown up front, you may get started by simply using PG Calc's default assumptions, which are based on historical returns. *[Sarah MacEachern, Senior Client Services Advisor]*

6. In *GiftWrap*, I need help producing various reports in *GiftWrap* – how do I deal with pop-up blockers and other report issues?

Answer: *GiftWrap* is a cloud-based (internet) application, and as such, it is highly dependent on the internet browser you select to use. Each internet browser has its own settings, and the characteristics are detailed in the release notes in *GiftWrap* – simply click on “Latest Product Info” at the top of the screen. We recommend running *GiftWrap* in Google Chrome for the best results. *[Jeffrey Frye, Senior Client Services Advisor]*

5. In *PGM*, I'm having trouble exporting my gift cases into Microsoft Word – how do I get rid of the Protected View restriction?

Answer: The Protected View restriction is a security measure implemented by Microsoft to avoid unnecessary risk in opening Word documents received from other sources. There is a one-time process to modify the settings in Microsoft Word. You can find step-by-step instructions in the *PGM* Help Index: type “Word” in the keyword field, then click Word 2010 or 2013 or 2016 > Trouble opening PGM presentations in. You are also welcome to give us a call or send us an email. *[Michael Heep, Client Services Advisor]*

4. In *GiftCalcs*, how do I get reports providing information about my donors' site visits?

Answer: *GiftCalcs* can provide you with an extensive array of information about its use: it's simply a matter of working with us to set up the information you would like to receive. Please give us a call, and we'll be happy to walk through the various choices available. [Jen Wickham, Senior Client Services Advisor]

3. In *Bequest Manager*, can I project future remainder and gift values?

Answer: *Bequest Manager* is an excellent vehicle for maintaining information about your bequest-type gifts. It offers the ability to project when your bequests will mature, the eventual dollar values of those bequests, and the values of those bequests discounted to present value. Choose Analysis > Projected Remainder Amounts in the toolbar to see a report containing all this information. [Samantha Benson, Client Services Advisor]

2. In *GiftWrap*, my auditors told me we should be using the 2012 IAR mortality table – is that in *GiftWrap*, and how do I select it?

Answer: Yes, indeed, the 2012 IAR table is in *GiftWrap*! There has been a lot of confusion over mortality tables in general since the release of that table, and we have received a lot of questions around it. For standard state reserve calculations, the mortality table is dictated by the states, so *GiftWrap* chooses the appropriate mortality table for you. For FASB liability reports, you can choose in the report criteria screen whichever table you prefer, including 2012 IAR, but we're always happy to discuss the different choices with you to help you make the best decision. [Christopher Lee, Client Services Advisor]

1. In *PGM*, I received a message saying that my version of *Planned Giving Manager* is out-of-date – how do I get the latest version?

Answer: We seem to get more update-related questions than any other category! When we release a new version of *PGM*, we send an email to all licensed users, alerting them to the update and providing a link to download the newest version. Not surprisingly, there are always people who do not receive the notice or otherwise do not update *PGM* in a timely fashion, for one reason or another. With this reality in mind, we have built a special feature into the application to alert the user when their version is not the latest. If *PGM* displays a message that tells you it is out of date, please give us a call or send us an email message, and we'll be happy to verify your account status and send you the latest version by email. [Tina Yelle, Director of Client Services]

We hope this information is helpful, but we also want to remind you – and reassure you – to call us, or email us, whenever you have a question. PG Calc has the best clients and WE LOVE TO HEAR FROM YOU! You may call us toll-free at 1-888-474-2252 or contact us by email at support@pgcalc.com.

On behalf of everyone here at PG Calc, we wish you a joyous holiday season and a most bountiful new year!