BatchCalcs
Personalize Your Marketing

«AddressBlock»

Dear «Salutation»,

Thank you for your generous support of the work we do at State University.

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will provide you not only with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the State University.

If you were to create another gift annuity for the same annuitants this year with «Amount» in cash, you will receive a charitable income tax deduction of approximately «Deduction» and the annuitants will receive annual payments of «Annual_Payment» for the rest of their lives. What's more, «Taxfree_income» of the payments you receive each year will be tax-free during the first «Expected_return_years» years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with the State University or have any questions about how you can support our work, please call me at 333-222-1111 or email me at jfundraiser@su.edu.

Thank you again for your generous support of State University.

Sincerely,

Jane Fundraiser
Director of Gift Planning

State University Foundation
123 Peabody Street
Boston, MA 01102

Joe Smith
123 Elm Street
Boston, MA 02134

Dear Joe,

Thank you for your generous support of the work we do at State University.

As a participant in our gift annuity program, I know you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2007 will provide you not only with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the State University.

If you were to create another gift annuity for the same annuitants this year with $10,000 in cash, you will receive a charitable income tax deduction of approximately $5,321 and the annuitants will receive annual payments of $720 for the rest of their lives. What's more, $318 of the payments you receive each year will be tax-free during the first 7.8 years
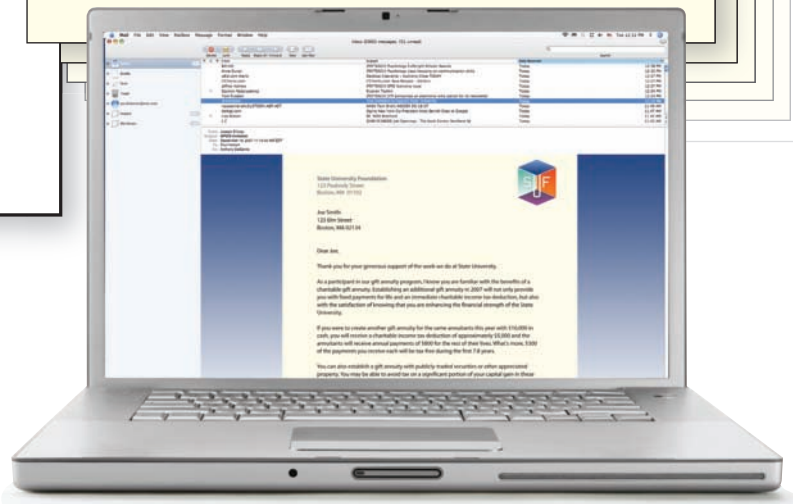
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Jane Fundraiser
Director of Gift Planning

PG CALC
Your partner in planned giving[SM]

What is the BatchCalcs Service?

PG Calc's BatchCalcs service gives fundraisers an automated way to make their planned giving mailings more effective by including personalized calculations in each prospect letter or e-mail.

Our BatchCalcs service adds individual planned gift calculations for each person in a file of donor information in order to allow you to personalize a direct mail or e-mail solicitation. Once the calculations have been added to your file, we can return it to you for fulfillment or we can produce the solicitation for you. The gift information can be merged into your letters/e-mails or provided on separate illustration pages.

Add Personalized Planned Giving Calculations to Your Mailings

Whether you want to mail to a few hundred prospects or many thousand, our BatchCalcs service gives you a fast, easy, and affordable way to add impact to each message.

All you have to do is send us a file of birthdates or ages, plus a name or ID for each prospect, and we add basic planned gift calculations for the gift type of your choice: gift annuities, deferred gift annuities, unitrusts, annuity trusts, pooled income funds, or charitable lead trusts. If you want to include additional information for each prospect, such as a target gift amount, you can. Just tell us what to assume for all the values you don't supply in the file.

The calculations we can add to your file include:

- Charitable deduction
- Beneficiary actuarial ages
- Gift annuity rate and amount
- Tax-free, capital gain, and ordinary income portions of annuity
- Years of tax-free income from annuity

What you send to us

ID #	Birthdate 1	Birthdate 2
1	08/24/1925	01/14/1924
2	11/30/1932	01/02/1934
3	11/09/1913	

What we send back to you

ID #	Birthdate 1	Birthdate 2	Gift Amount	Deduction	Annuity %	Annuity	Tax-Free
1	08/24/1925	01/14/1924	$10,000.00	$5,000.12	8.0%	$800.00	$300.00
2	11/30/1932	01/02/1934	$10,000.00	$6,000.15	7.4%	$740.00	$260.00
3	11/09/1913		$10,000.00	$6,470.70	11.3%	$226.00	$882.53

Ideas

1. Fall mailing to all existing gift annuity donors

It is early fall and you want to send a mailing to all of your organization's several hundred gift annuity donors. The letter will thank each donor for his/her past generosity and encourage the donor to fund another gift annuity. You want to include the specific charitable deduction and annuity rate each donor would get if the donor made a $10,000 gift before the end of the year. As a variation, you might want to use each donor's last gift as the target amount for their letter.

2. Semiannual mailing to gift annuity prospects

Twice a year you send a mailing to a list of several thousand gift annuity prospects. The prospects are selected based on their age and past giving history. The letter thanks each donor for his/her past generosity and encourages the donor to consider funding a gift annuity. You want to include the specific charitable deduction and annuity rate each donor would get if the donor made a gift for a target amount before the end of the year.

3. Mailing to deferred gift annuity prospects

You have identified a group of nearly 500 consistent annual donors to your organization who are 55 to 65 years old. You would like to send them a mailing on the deferred gift annuity that includes the charitable deduction and annuity each of these prospects would receive if they were to fund a deferred gift annuity today and defer payments for five years.

4. Mailing to prospects identified using Blackbaud *Analytics™*

You want to send a mailing to a list of several thousand gift annuity prospects and several hundred charitable remainder trust prospects who have been identified by Blackbaud *Analytics™* as having a high propensity to give using one of these gift vehicles. You want to include the specific charitable deduction and payment amount each gift annuity prospect would get if the prospect were to fund a $5,000 gift annuity before the end of the year. Similarly, you want to include the specific charitable deduction each charitable remainder trust prospect would get for funding a $100,000 5% charitable remainder trust before the end of the year. You want to mail to your annuity trust and unitrust prospects separately.

"Based on our initial positive experience with BatchCalcs, we have included BatchCalcs in our lead generation plans. In fact, we have scheduled a second BatchCalcs mail merge to go out this fall."

— Anna Marie Lang,
Annuity Office
Salesian Missions

"By using PG Calc's service we saved two days of manually calculating the numbers for the letter. We will definitely use the BatchCalcs service again."

— Michael Pohlmann,
Sr. Gift Planning Officer
American Civil Liberties Union Foundation

"The reasons for going to BatchCalcs are threefold: I want to strengthen our half birthday annuity program by capturing 2-life annuitants, gain efficiency by using GiftWrap as the source of my data (eliminating the manual MS Word document we've been using), and ensure the consistency of the mailing, all while reducing labor costs."

— Eleanor M. Jordan, Ambassador
Society of the Little Flower

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Sincerely,

Jane Fundraiser
Director of Gift Planning

BatchCalcs Service is very affordable

Option 1
Add calculations to file: $500 for up to 500 records.
$0.25/record for each record over 500.

Option 2
Add calculations to file and produce printed or electronic mailing: Option 1 fees plus fee for mailing fulfillment. Contact PG Calc to discuss mailing fulfillment fee.

# Records	Fee
250	$500
500	$500
1,000	$625
5,000	$1,625

Please note that there will be an additional fee if your data is delivered in a form too far from our specifications, or if we need to provide more than modest assistance in helping you extract your data from your database.

Contact us today for more information

Call us at 888-497-4970 or e-mail info@pgcalc.com.

Data Sources

Your source simply needs to provide a file of birthdates in Excel, comma-separated, or tab-separated format.

Your data source can include:

- Your organization's donor database
- PG Calc's GiftWrap gift administration database (PG Calc can extract your data for no extra charge)
- An Excel spreadsheet of highly-rated planned gift prospects supplied by Blackbaud *Analytics™* or other prospect research service
- A database or spreadsheet of your organization's current planned gift donors
- The organization that administers your planned gifts (many use PG Calc's GiftWrap)