

FACILITATOR SLIDE DECK — SAMPLE DRAFT

GiftWrap Fundamentals

A companion deck to the GiftWrap Fundamentals training manual and facilitator prep notes — built for use alongside live instruction, not as a standalone read.

Session dates September 22 & 29, 2026 **Provided by** PG Calc

Session Roadmap

16 Modules, Front to Back

- | | | | |
|---|---------------------------------|----|-------------------------------|
| 1 | What GiftWrap Can Do | 9 | Data Integrity and Verify |
| 2 | How GiftWrap Is Structured | 10 | Setup and Configuration |
| 3 | Gift Annuity Basics in GiftWrap | 11 | Users, Roles, and Permissions |
| 4 | Entering Data into GiftWrap | 12 | Ongoing Gift Maintenance |
| 5 | Searching and Reviewing Records | 13 | Reporting and Custom Filters |
| 6 | Adding and Updating People | 14 | Payments |
| 7 | Addresses and Delivery Details | 15 | Year-End and Tax Reporting |
| 8 | Adding Gifts | 16 | Help and Support |

What GiftWrap Can Do

You will be able to: Explain GiftWrap's role as an administration system, not just a database.

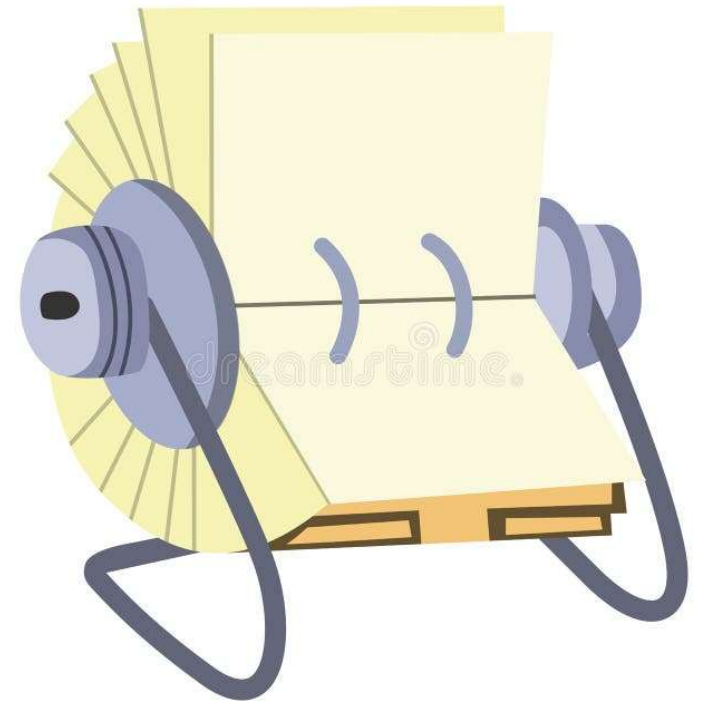
- Store donor, prospect, advisor, and beneficiary data
- Produce reports; calculate reserves, FASB liabilities, and market values
- Print checks, process EFT, and print 1099-Rs
- Maintain a full audit trail across every record



How GiftWrap Is Structured

You will be able to: Describe how people, gifts, and associations relate to one another.

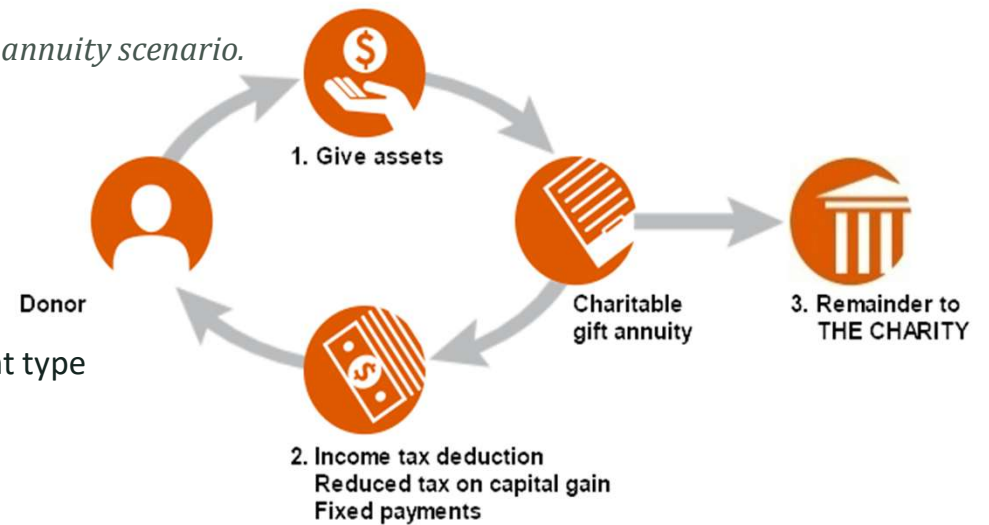
- Separate person records and gift records
- Associations link a person to a gift, and define the relationship
- Spouse links connect two person records for mail merge
- Multiple addresses exist at both the person and gift level



Gift Annuity Basics in GiftWrap

You will be able to: Apply the correct Association type for each gift annuity scenario.

- Donor vs. annuitant are not always the same person
- Donor/Bene-A, Bene-I, and Donor/Bene-I associations
- Joint and survivor vs. successor agreements
- Always check the contract language and note the arrangement type



Entering Data into GiftWrap

You will be able to: Choose the right method for entering new person and gift data.

- Import from PGM / PGM Anywhere (gftx or biox) whenever possible
- Reserve manual entry for exceptions, not routine work
- Other imports: address changes, cleared checks, trust market values, bequest intentions



Searching and Reviewing Records

You will be able to: Locate and confirm existing records before editing them.

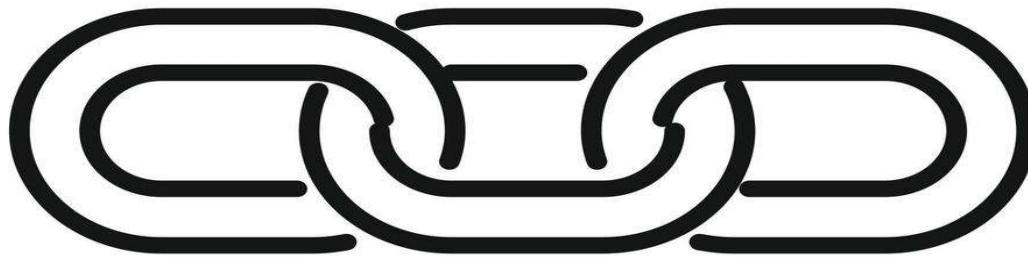
- Search for people, gifts, and remainder / fund beneficiaries
- Review the Person and Gift Information screens
- Use grids, tabs, hyperlinks, and tooltips
- Sort any list by clicking a column header



Adding and Updating People

You will be able to: Add a new person record and link spouses correctly.

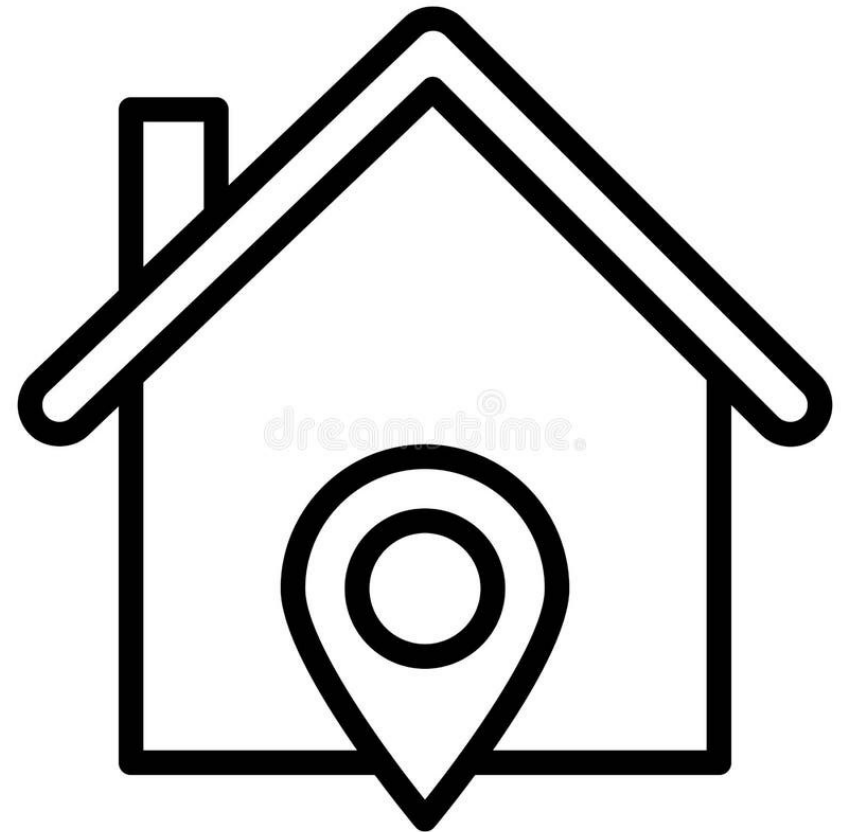
- Use the Add Person Wizard
- Link two person records together as spouses
- Update fields directly on the Person Information screen
- Print a Person Profile



Addresses and Delivery Details

You will be able to: Set up the correct address type for each delivery need.

- Home, payment, seasonal, business, and tax-form addresses
- EFT and payment address setup
- Know when to use a payment address instead of the home address



Adding Gifts

You will be able to: Add a gift accurately, using imports when available.

- Add Gift Wizard, or import from a PGM/PGM Anywhere file
- Understand check rows and tax tiers
- Handle 2-life gifts and link people correctly
- Print a Gift Profile



Data Integrity and Verify

You will be able to: Run Verify as a routine control, not a cleanup project.

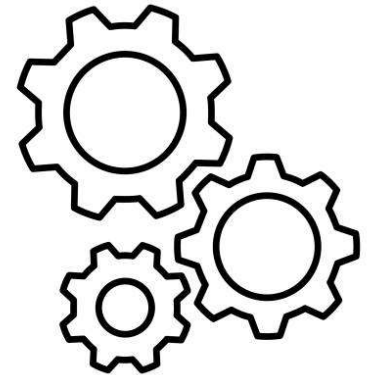
- Run Verify Person and Gift Data on a set cadence
- Fix missing, inconsistent, and conflicting data
- Maintain a Verify log for known, harmless exceptions
- Suppress only warnings you're certain are harmless



Setup and Configuration

You will be able to: Recognize how Setup choices drive downstream reporting and tax forms.

- Charity, Organization, Pooled Income Fund, Designation
- Rating, Officer, Advisor Type, Legacy Society
- State reserve percentages and mortality tables



Users, Roles, and Permissions

You will be able to: Configure roles and user accounts to protect security and accountability.

- Roles and permission sets
- Individual user accounts — never shared logins
- Making a former user inactive vs. deleting them
- Password resets and the audit trail



Ongoing Gift Maintenance

You will be able to: Handle severance and death events safely, with no “undo.”

- Severing a gift
- Recording deaths
- Reviewing the effect on payments and tax reporting
- Print profiles before making any changes



Reporting and Custom Filters

You will be able to: Produce accurate reports and preserve the criteria behind them.

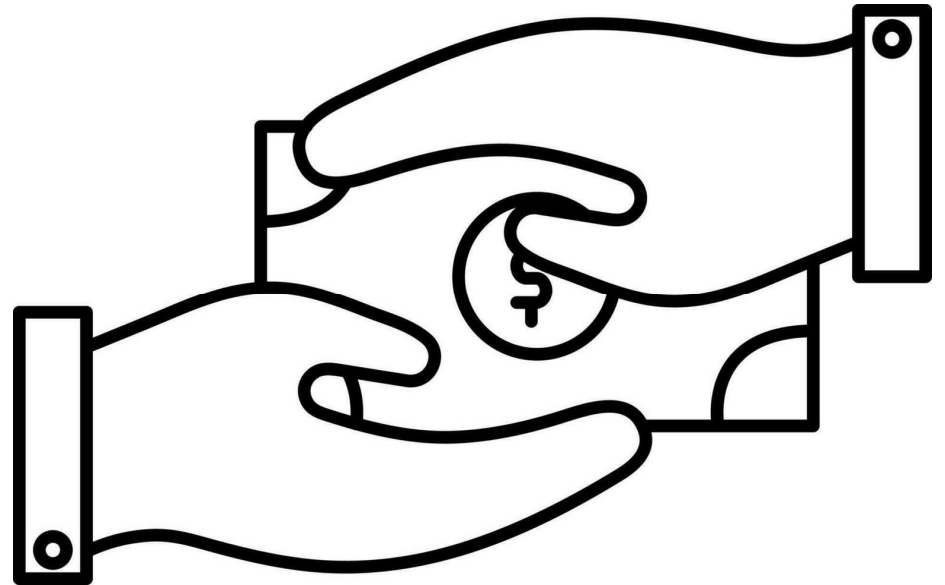
- Person Summary and Gift Summary reports
- Report output options and raw data export
- Custom filters and designation reporting
- Always retain the selection and sort criteria



Payments

You will be able to: Review payment operations before releasing checks or EFT files.

- Payment Summary report and Payment Settings
- Printing checks and processing EFT
- Payment Snapshot / Void
- Check Register for reconciliation



Year-End and Tax Reporting

You will be able to: Sequence year-end tasks in the correct order.

- Organization year and Year End Update
- 1099 Summary and producing 1099-Rs
- IRS filing timing (paper vs. electronic)
- Follow the yearly order of operations



Help and Support

You will be able to: Use built-in Help and know when to escalate to Client Services.

- Online Help by field, page, procedure, or concept
- Index and keyword search inside Help
- PG Calc Client Services for anything Help doesn't answer



Five Points to Remember

- 1 GiftWrap is an administration tool, not just a contact system.**
The introduction frames flawless administration as part of fiduciary responsibility and donor stewardship.
- 2 People, gifts, and associations are the backbone.**
If trainees do not understand this structure, everything else feels confusing.
- 3 Imports are preferred over manual entry.**
This should be taught as a best practice, not just an option.
- 4 Verify should be treated as a recurring control.**
The manual explicitly recommends adding Verify to the checklist and assigning responsibility.
- 5 Year-end is procedural, not casual.**
Organization year, payment rows, 1099 timing, and Record Death all depend on timing and order of operations.

Training Checklist, at a Glance

Foundations

- ☐ Explain what GiftWrap does and which functions depend on modules
- ☐ Explain people vs. gifts vs. associations
- ☐ Cover key gift annuity association types
- ☐ Show how to search before adding anything new

Controls & Configuration

- ☐ Cover Verify and when it should be run
- ☐ Explain setup items that affect reporting and tax forms
- ☐ Review user roles and access controls

People, Addresses & Gifts

- ☐ Demonstrate adding a person and linking spouses
- ☐ Demonstrate address setup, especially payment and seasonal
- ☐ Demonstrate adding a gift, ideally by import
- ☐ Explain why imports are preferred
- ☐ Show how to review payment rows and tax tiers

Lifecycle, Reporting & Year-End

- ☐ Show how to record a death — profiles first
- ☐ Show how to sever a gift
- ☐ Demonstrate core reports and export options
- ☐ Review payment functions, EFT, and voids
- ☐ Explain organization year and Year End Update
- ☐ Cover 1099-R timing and yearly order of operations
- ☐ Show how to use Help inside GiftWrap

WRAPPING UP

Key Phrases & Where to Send Questions

"GiftWrap is only as useful as the quality of the data going in."

"Search first, then add."

"Imports reduce risk."

"Verify is a routine control, not a cleanup project."

"Year-end work has to happen in the right order."

"When in doubt, use Help and document what you did."

PG Calc Client Services

Unlimited toll-free phone support for anything Online Help doesn't resolve.

888-474-2252

support@pgcalc.com