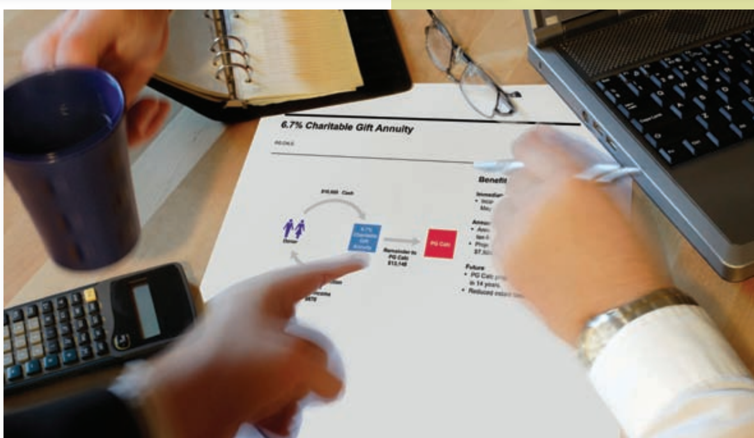
# Planned Giving Consulting

Partnering with our clients to optimize success




PG CALC

Your partner in planned giving℠

*With over 20 years of experience serving the gift planning community — and nationally recognized planned giving experts on our staff — we make planned giving our business. Who better to partner with when you need help meeting the requirements of your donors, their advisors, your auditors, colleagues, and state gift annuity regulators?*

# How We Can Help

We provide you with sage advice that enables you to handle your gift planning with confidence. Whether you simply need to fill in the gaps with your existing program, or the world of planned giving is entirely new and you need help understanding where to start, call on us. Here are some of things we can help with:

## Program Planning

### Starting a Program

*Step-by-step guidance that will get your planned giving program up and running.* We assist with evaluating donor potential, securing board approval, developing policies and budgets, reporting, accounting and gift management, marketing planned gifts, and recruiting and training staff.

- **Turnkey Gift Annuity Program —** Implement an effective gift annuity program with step-by-step assistance. Our turnkey program includes a daylong site visit, five hours of follow-up consulting, and a copy of *Charitable Gift Annuities: The Complete Resource Manual* — a must have resource for any gift annuity program.

### Program Assessments

*Increase the effectiveness of your program so that it reaches its full potential.* We focus on internal operations, marketing efforts, and interaction with donors. Regardless of the size of your program, or how long it's been underway, our experts will help you fine tune it for the best results.

- **Program Audits —** The stability of either a gift annuity program or an overall planned giving program can be greatly enhanced when strengths and weaknesses are identified. We perform audits that make it possible for you to minimize risks, initiate improvements, and maximize benefits.

### Gift Annuity State Registration

*Become compliant and streamline the process of state-specific registration.* We'll guide you through all the materials you need to be aware of, including letters, forms, and agreements. All you do is answer our questions, provide backup material as requested, and sign the applications!

## Gift Planning

### Staff Support

*Valuable backup for you and your colleagues — ideal for institutions without dedicated planned giving personnel.* We'll expand your ability with ongoing assistance in areas such as making presentations, responding to donor inquiries, preparing financial illustrations, and facilitating gifts.

- **Gift Design —** For institutions needing help with the design of a gift plan — a mega gift or an unusual situation — and perhaps a detailed financial overview as well. Our gift planning experts have decades of experience for you and your donors to draw upon.
- **Gift Illustrations —** If you know what you need, we can run illustrations on our various software platforms and send them to you electronically for you to give or forward to your donors.

### Donor Support

*Just as we help charitable institutions, we also work with donors as a service to our clients.*

- **Direct Donor Contact —** We can engage in direct contact with donors to guide them on what might best suit their needs, furnish their advisors with useful information, and ultimately help them create the gift plan they will be most satisfied with.
- **Appraisals —** For those who need to obtain a qualified appraisal of a life income interest contributed to a charitable organization.

### Cross-Border Giving

*Assistance in understanding the tax implications of gifts from Canadian donors or from American donors with Canadian property.*

## Gift Administration

### Staff Support

*Behind-the-scenes assistance with staff functions, typically in the Treasurer's area.* This service is ideal for institutions that do not have personnel with planned giving expertise. We'll expand your ability with ongoing assistance in areas such as compliance with state and federal requirements, production of payments and tax forms, and understanding the important nuances of investing planned giving assets.

# How We Can Work with You

At PG Calc we have the experience to know that because every organization is different, its needs will be different as well. For this reason, we offer a variety of ways you can engage our services. This allows you to choose the one that fits best:

- **À La Carte Services —** You don't have to be an established PG Calc client to use our services. PG Calc's specialized expertise can be called upon whenever you need it. Simply pick from our menu and go!
- **Bundles of Products and Services —** Choose from several alternative combinations of products and services typically needed to get up and running. For example, the Turnkey Gift Annuity Program, our Planned Giving Manager software, and setup for our Gift Administration Services make a great combination.
- **Ad Hoc Assignments —** If the project is definable, our consultants will work on an hourly fee basis and bill monthly. This method allows you to target our services to meet the needs of specific projects.
- **Monthly Retainer Arrangements —** These enable you to request our services whenever our involvement may be desired, without having to keep track of the time being spent. They are flexible in both the scope of services made available and the length of the contract. Retainer clients get priority access to our staff.

If you have any questions, or want to discuss the various options, feel free to contact us to discuss your needs at 888-497-4970 or info@pgcalc.com.

To speak directly with the Planned Giving Services Division, please call 206-329-8144.

PLANNED GIVING SERVICES

PG CALC

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