



eRate Newsletter March 17, 2016

IRS Discount Rate: April 1.8%

The valuation rate for gifts to new pooled income funds is 1.2% in 2016 .

Why Websites Still Matter

At PG Calc, we build planned giving websites for charities every day, for organizations small and large, for healthcare providers and educational institutions, for arts and aid organizations. Every non-profit needs a substantive planned giving website that is the focal point of their planned giving marketing program. Most people agree with this premise, yet every now and then we hear from someone saying they don't need a website, and that websites don't matter. The argument is made that it's a waste of money or that their donors don't want to read online content. Some even think that a website prevents donors from calling for more information.



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UPCOMING WEBINAR

[Harnessing the Power of the Bequest Challenge Match](#)



Presented by [Mohammad Zaidi](#) and [Michael Pohlmann](#)

Thursday, March 31st
1 PM - 2:30 PM ET

[Register](#)

UPCOMING TRAINING

Gift Planning with *Planned Giving Manager*

April 5-6
St. Louis, MO

April 27
Houston, TX

Gift Administration with *GiftWrap*

April 28-29
Cambridge, MA

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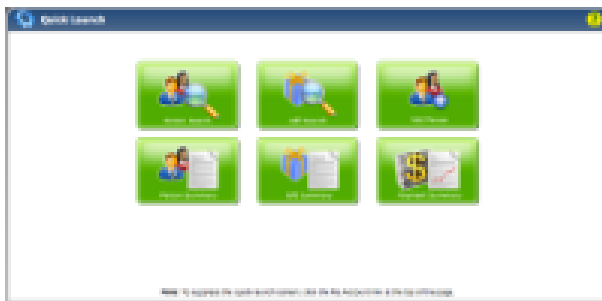
www.pgcalc.com

Quick Tip: Using the *GiftWrap* Quick Launch Page

Do you know about the ***GiftWrap* Quick Launch page**? This page gives you immediate access to the most frequently used functions in *GiftWrap* when you log in. Though not well known, this feature is very popular among the *GiftWrap* clients who use it and is easy to configure. Just follow these steps:

1. Log into *GiftWrap*.
2. Click on the "My Account" link in the top right banner.
3. Under the Settings section, select "Use quick launch as default page."
4. Click the OK and Close buttons.

The next time you log into *GiftWrap*, you will be presented with the quick launch splash screen, from which you can immediately initiate a person or gift search, or perhaps print a person or gift summary!



Marketing Corner: Improving Marketing Through Photos

Once in a while an article comes along that is so relevant to our work that it's a wonder why more organizations aren't already doing what the article prescribes.

[Read More>>](#)

Missed a PG Calc Webinar? Watch the Webinar Recording Instead

As you know, each month PG Calc offers a webinar on a topic of interest to gift planners. You may not be aware, however, that we record every one of them. The recordings serve two purposes.

1. If a person who has registered to attend one of our webinars does not use their registration for any reason, he or she receives an email within two days of the presentation that includes a link to a recording of the webinar. The link can be used twice.
2. We also make a permanent recording of the webinar available for purchase. This recording becomes available within two to three weeks

of the presentation. It can be purchased for \$150 and can be viewed as often as the purchaser wants. Webinar registrants can purchase this same recording for an additional \$100 over the cost of their registration.

Consider *BatchCalcs* to Enhance Your Spring Gift Annuity Mailing

A more personal message is a more effective and engaging message. PG Calc's *BatchCalcs* service makes it easy for you to personalize the message you send to your gift annuity prospects this spring.

Here's how *BatchCalcs* works. You send us a spreadsheet with the birth date(s) to use for each prospect. You can also provide us with the target gift amount to use for each prospect, if you wish. Our *BatchCalcs* service then can add the charitable deduction, annuity amount, and amount of tax-free income the prospect would receive if he or she were to fund a gift annuity. Our *BatchCalcs* service can accommodate immediate payment and deferred gift annuities, current or past ACGA rates, and even custom annuity rates. We can also create a personalized Summary of Benefits chart for each prospect or create a letter that includes one or more *BatchCalcs* values.

To learn more about *BatchCalcs*, [click here](#), or contact Dave Wolfe at dwolfe@pgcalc.com or 888-497-4970.

A Valentine from the University of Denver

It isn't often that clients send us Valentine wishes, but the planned giving staff at the University of Denver did just that.

Jon Kraus, Director of Development, Gift Planning at the University of Denver, was one of the signees. Jon is an enthusiastic PG Calc customer and *Planned Giving Manager (PGM)* user. Jon has been at

DU for almost three years and has worked in the field of development for over 15 years.

While the DU planned giving program is successful by any measure, having raised on the order of \$150M in planned gifts during their most recent campaign, Jon is always on the lookout for new donors. The planned giving office at DU is staffed by three full-time gift planners, as well as an administrator, and that's where most of the work gets done. However, the DU planned giving staff also works closely with other development officers at the University, and as a result, close to 30% of donations at the University are planned gifts.



Jon had this to say about PGM:

"The nice thing is PGM can work for a variety of donors. Most donors aren't very familiar with all these giving vehicles, so you start with the 'How It Works' diagram, but for those who just want to see the numbers, we can give them that. If they don't know how it works, they need to see the arrows and diagrams, and we can give them that too. We can give them real basic or real detailed information, based on what they need to know."

Jon went on to say:

"Planned Giving Manager makes us seem like professionals. When we're interfacing with development colleagues, and certainly when we're meeting with donors, it's nice to have the templates and University of Denver branding consistent throughout. When you're able to show them the numbers with a lot of certainty, tax rates and payouts, it makes the donor more comfortable that we have been doing this for a while and that we know what we are doing."

Steve Shineman, Sr. Director of Gift Planning at the University, is also a loyal PG Calc customer. He has been at DU for two years, and prior to that, used PGM as his go-to resource for seven years at Texas Christian University. Steve said the following about PGM and PG Calc's industry leading Client Services team:

"PGM output is exactly what the donor needs to see the first time they have discussed that they are interested. The 'How It Works' diagram is basic and easy, which is just what the donor needs – so that its not confusing. Not intimidating. Never had a donor say I don't understand this when I show them the PGM output."

"We have found that PG Calc Client Services are phenomenal. Never once have I called where someone hasn't picked up. So I just love knowing that I can call at just about any hour and get exactly the response I'm looking for."



[Learn more about the University of Denver >>](#)

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