



eRate Newsletter

March 16, 2017

### **IRS Discount Rate: April 2.6%**

The valuation rate for gifts to new pooled income funds is 1.2% in 2017 .

### **A New Mindset for Gifts of Real Estate**

A gift of real estate can be one of the most generous gifts that a charitable organization will ever receive. Yet, many charities decline all proposed gifts of real estate, certain that Armageddon awaits as soon as they receive the deed. The reality is often quite different.



Learn a practical approach to evaluating gifts of real estate that will enable every charity to consider these gifts.

[READ THE FULL ARTICLE >>](#)

[PRINT THE FULL ARTICLE >>](#)

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### **UPCOMING WEBINARS**

#### [Successfully Navigating Gifts of Real Estate](#)



Presented by  
[Mike Valoris](#)

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

 [Register](#)

### **UPCOMING TRAINING**

#### *Planned Giving Manager*

April 5-6  
Atlanta, GA

April 26-27  
Cambridge, MA

#### *Lead Trust School*

June 21  
Cambridge, MA

#### *Planned Giving By the Numbers*

June 22  
Cambridge, MA

*GiftWrap*

May 8-9  
Cambridge, MA



[www.pgcalc.com](http://www.pgcalc.com)

### **Quick Tip: Adding New Pages to Marketing Services Websites**

Did you know that you can add a page to your PG Calc Marketing Services Website describing any planned giving asset or vehicle? So far, we've done *ad hoc* pages for Bitcoin and for gifts from Donor Advised Funds. They're easy to setup and absolutely FREE!

Just come up with the idea and let us help you with the rest. As with any of our other pages, these pages can have descriptions, examples, calculations done on the fly (never hardcoded!), and plenty of space for mission-related copy. Once we've helped you make the page, we'll figure out the right location in your navigation (menu) and off you go.

Please feel free to contact us at [apalmer@pgcalc.com](mailto:apalmer@pgcalc.com) or 888-497-4970 if you are ready to add a page, or if you're ready to add a whole planned giving website!

### **PGM Clients Get PGM Anywhere Too!**

Are you a *Planned Giving Manager, Mini Manager, or Gift Annuity Manager* client? If so, you can have a *PGM Anywhere* account, too, for no additional charge. Prepare planned gift illustrations while sitting in your donor's living room or anywhere else you happen to be. All you need is a tablet, laptop, or desktop computer and an Internet connection. Email proposals with a single click. Save a case on one device and open it on another one. Navigate *PGM Anywhere's* elegant interface. [Click here](#) to sign up!

[Read More>>](#)

### **Marketing Corner: An Underutilized Cultivation *and* Marketing Tool**

Do you need a reason to reach out to your legacy society members? Would you like to move the cultivation process forward with your top planned giving prospects? Here's a fairly simple way to accomplish both – *focus groups*. While it helps to have some knowledge or experience in running a focus group, it is not a requirement and should not prevent you from conducting one. It's a smart way to get thoughts on your planned giving marketing, whether about a new direction or the effectiveness of your current marketing program.

[Read More>>](#)

### **GiftCalcs Updated on March 9**

As promised in last month's eRate, we are in the process of releasing a series of updates to *GiftCalcs* over a few months. Our latest release was on March 9. This latest release of PG Calc's online planned gift calculator expands the ways clients can customize its appearance and functions to meet their needs.

[Read More>>](#)

### **Spring Training Opportunities**

Join us in Atlanta for *Planned Giving Manager* training on April 5 and 6,

or in Cambridge at the end of the month, April 26 and 27. The first day, the Introductory session, will give you an opportunity to illustrate various gift types while learning the robust features of the software. The next day, the Advanced session, we will discuss more complex charitable gift options, including flip trusts, retained life estates, testamentary gifts of retirement assets, and charitable lead trusts.

On May 8 and 9, we'll offer a session on gift administration best practices, using PG Calc's *GiftWrap* software. This will be followed by a second day of *GiftWrap* reporting and analysis. You'll learn how to use *GiftWrap*'s powerful capabilities for all your reporting needs, generate FASB liabilities and State Reserve reports, and produce payments and tax forms for your annuitants, as well as the associated IRS tax file.

In June, we will be teaching Lead Trust School, where we'll concentrate on the intricacies of the charitable lead trust and its effect on transfer and income taxation. The next day the topic will be Planned Giving By the Numbers. In this session we'll look at the actuarial calculations behind the charitable deduction, taxation of the payment stream, and more.

[Register>>](#)

### **The Maine Community Foundation Benefits from PG Calc Training Sessions**

The Maine Community Foundation works with donors and other partners to improve the quality of life for all Maine people. It was founded in 1983 and since then has sent more than \$310 million in grants to projects and communities, primarily in Maine. The Foundation has more than 1,700 funds and \$450 million in assets. In 2016, the Foundation awarded more than \$33.5 million in grants and scholarships.

Jennifer Richard, a trust and estate attorney, joined the Maine Community Foundation in July 2016 as their Director of Gift Planning. Her primary role is to be a resource for professional advisors across the State of Maine, helping them enable their clients to reach their philanthropic goals in the most efficient and meaningful way possible. Jennifer signed up for the PG Calc *Planned Giving Manager* Introductory and Advanced software training programs to complement her legal knowledge of planned giving. Jennifer had the following to say about the PG Calc training sessions:

*"The PG Calc PGM training exceeded my expectations, as it provided me with the tools I needed to demonstrate in a simple and understandable way how a particular planned giving strategy will work on a day to day basis for a donor. Since the proposals are understandable, it makes it easy to compare strategies and alternative gifts to be sure the gift is as efficient and meaningful as possible for the donor."*



[Learn More About the Maine Community Foundation](#)

[Learn More About PG Calc Training](#)

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