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IN PLANNED  
GIVING  
SUCCESS

eRate Newsletter | July 19, 2017

## IRS DISCOUNT RATE: August 2.4%

### Missing Persons and Uncashed Checks

One of the most frequent challenges encountered in the administration of life income gifts is the issue of uncashed checks. We've all seen or heard of these situations – a check is sent to an annuitant of a gift annuity, or to the beneficiary of a charitable remainder trust (or pooled income fund), and it is never cashed.

This month's featured article addresses what a charity should do when a beneficiary stops cashing life income payments.



[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

#### UPCOMING WEBINAR

Getting Bequests Right from Prospect Identification to Realization



Presented by

[Mike Valoris](#)

Thursday,  
July 27

1:00 - 2.30 pm ET

[REGISTER](#)

#### UPCOMING TRAINING

##### Planned Giving Manager

August 8-9, Boston, MA

September 13-14, Washington, DC

October 12-13, Baltimore, MD

##### GiftWrap

August 16-17, Cambridge, MA

November 2-3, Cambridge, MA

[VIEW](#)

#### In this Issue:

- Quick Tip: How and Why to Set the File Open/Save Locations in *Planned Giving Manager*
- Marketing Corner: Advisor Marketing? No, It's Advisor Stewardship

- Update Financial Information in *Planned Giving Manager* and *PGM Anywhere* for Fiscal Year End
- You Can Still Enjoy PG Calc's Summer Training Sessions
- Brigham and Women's Hospital Turns to PG Calc for *Marketing Services*

## **Quick Tip: How and Why to Set the File Open/Save Locations in *Planned Giving Manager***

There are two good reasons to take advantage of a feature in *Planned Giving Manager (PGM)* that allows you to set the default location for saving and retrieving your illustrations.

The first reason is to protect your gift illustrations from loss. Unless you specify otherwise, your input files and exported Word documents will be saved to the application folder, usually C:\PGM. Files saved to your C: drive may not get backed up and may be lost if your hard drive fails, or gets replaced or re-imaged.

The second reason is simple convenience. Busy gift planners don't want to browse through a file system every time to put the illustration in the right place. Once you set the default location for saving files, it is easy to click *Save* and be done.

How to set your default File Open/Save Location:

1. Choose *Customize > Setup* on the menu bar
2. Choose *File Open/Save Location*
3. Browse to the folder you want to be the default folder. Then, click the folder so its name appears in the "Folder" field
4. Click *OK*
5. Choose *File > Save Configuration* on the menu bar
6. Click *Save*
7. Relaunch PGM to see your change take effect

Give it a try! Please contact Client Services at 888-474-2252 or [support@pgcalc.com](mailto:support@pgcalc.com) if you have questions or would like assistance.

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## Marketing Corner: Advisor Marketing? No, It's Advisor Stewardship

In the planned giving community, there is considerable controversy about how much time (and money) should be spent marketing to financial advisors. When working with our clients, we often ask about strategies they have found to be effective when working with and marketing to advisors.

In this month's Marketing Corner, read about effective techniques for engaging financial advisors.

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## Update Financial Information in *Planned Giving Manager* and *PGM Anywhere* for Fiscal Year End

June 30 marks the end of the fiscal year for many non-profit organizations. Remember to update your organization's financial information in *Planned Giving Manager* as soon as your audited financials are complete.

1. On the menu bar, choose Customize > Organization Information
2. Double click the organization name
3. Click Next until you see a window that starts with "Gift Annuity Disclosure Statement"
4. Update the information on the charity's total invested funds, including the date of valuation, amount, types of assets in which funds are invested, gift annuity reserve information and policies, etc.
5. To save your changes, choose File > Save Configuration in the menu bar, then click Save

You can update this same information in *PGM Anywhere* as follows:

1. On the icon bar, choose Customize
2. Click  to the left of the organization name
3. Click the "Gift Annuity Disclosure Statement" title bar to expand this section
4. Update the information, then click Save

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## You Can Still Enjoy PG Calc's Special Summer Training Sessions!

Each year in June, PG Calc offers two special group training sessions – ***Lead Trust School*** and ***Planned Giving by the Numbers***. This year's sessions were extremely successful and participant feedback was positively glowing. So we wanted to let you know that it's not too late – you can still enjoy one or both of these sessions! As we do with our other group training sessions, we offer these classes as custom on-site training sessions. If you and your colleagues are interested in either of these sessions

– or both – please contact Tina Yelle, Vice President Client Services, at 888-474-2252 or [tyelle@pgcalc.com](mailto:tyelle@pgcalc.com).

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## Brigham and Women's Hospital Turns to PG Calc for *Marketing Services*

Brigham and Women's Hospital in Boston is a long-time PG Calc consulting client. Over the years, PG Calc has supported the hospital's gift planning program in a variety of ways, which have included strategic recommendations to grow the program, as well as consistent marketing consulting.

Recently, the hospital determined that it needed to reinvigorate its marketing program, and in particular, upgrade its planned giving web presence. The hospital wanted to bring its marketing to the next level, and in so doing, increase the number of planned giving donors in the program.

Kathleen Duffy, the Assistant Vice President of Gift Planning for the hospital, sought the advice of PG Calc. Kathleen was familiar with PG Calc's knowledge of the healthcare market. However, brand continuity, and the ability to customize any and all web content were also very high priorities for Kathleen, and she found that these are hallmark characteristics of the full complement of PG Calc's *Marketing Services*. Brigham and Women's Hospital signed on to PG Calc's *Marketing Services*, and this is what Kathleen has to say about our service:

*"PG Calc is an outstanding partner. From helping us successfully market our gift planning program to providing thoughtful answers to technical questions, the team at PG Calc consistently delivers."*



[Learn more about Brigham and Women's Hospital](#)

[Learn more about PG Calc \*Marketing Services\*](#)

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