



eRate Newsletter June 17, 2016

IRS Discount Rate: July 1.8%

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

How High Is the Sky?
PG Calc Client Services sometimes gets calls from clients who think there must be some sort of mistake when they see payout rates as high as 15% or 20% for deferred charitable gift annuities. However, no mistake has been made.

There is a significant difference between the *nominal payout rate* of a deferred gift annuity and the *effective payout rate* of a deferred gift annuity. Let's take a closer look at how these payout rates work and try to make some sense of it.



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UPCOMING WEBINAR

[Gifts of Oil and Gas and Other Mineral Interests](#)



Presented by [Joe Hancock](#)

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

 [Register](#)

UPCOMING TRAINING

Gift Planning with *Planned Giving Manager*

August 4-5
Boston, MA

Gift Administration with *GiftWrap*

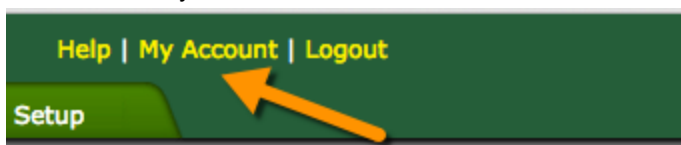
August 11-12
Cambridge, MA

 [View](#)

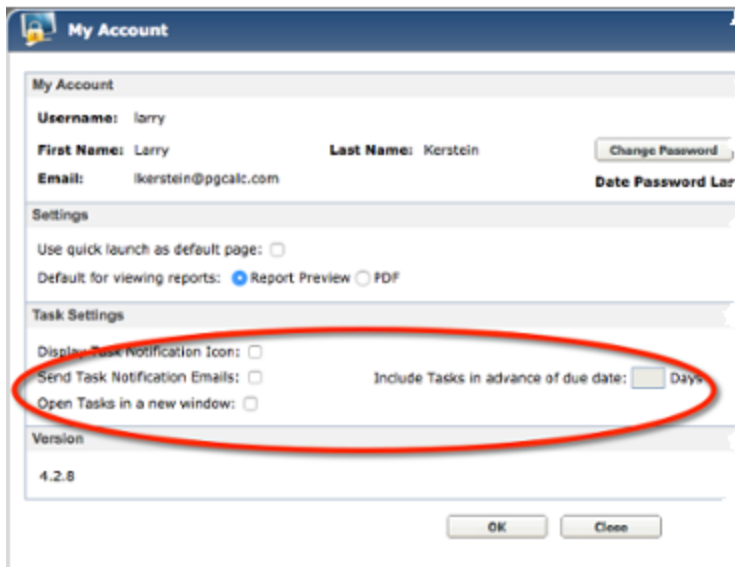
Quick Tip: *GiftWrap* Task Notifications

Did you know that you can receive alerts from *GiftWrap* about upcoming events? For example, you can have *GiftWrap* send you a notification email that it is time to request an estate inventory from a donor's estate. This functionality is available with the optional *Workflow* module. If your organization is not already using the *Workflow* module, please contact Sales to discuss adding this functionality. You can configure your *GiftWrap* account to automatically send you an email when a *Workflow* task is coming due, as follows:

1. Log into *GiftWrap*
2. Click on the "My Account" link in the screen banner



3. Find the **Task Settings** area.
4. Click on the "Send Task Notification Emails" checkbox.
5. Enter a value in the data entry box labeled "Include Tasks in advance of due date" to specify how many days in advance of the due date to receive notification.
6. Click OK.



Once you have completed these steps, you can count on never missing an important event!

Marketing Corner: Creating a Marketing Project Brief

Creating a successful marketing initiative takes a lot of planning and effort. Before beginning one, it is important to clearly layout all

aspects of the project. This month's marketing corner offers a helpful template for designing your next outreach effort.

[Read More>>](#)

Get *Planned Giving Manager* for Free with *Marketing Services*!

With PG Calc's *Marketing Services*, you will uncover more qualified prospects. Sign up for *Marketing Services AllGift+*, our multi-channel, fully customizable suite of direct and online marketing tools and services to drive more quality prospects to your organization.

If you are a current *Planned Giving Manager* customer and sign up for *Marketing Services AllGift+* package, we will **waive your primary copy PGM annual service fee!**

If you don't own *Planned Giving Manager*, the standard in planned gift calculations, we will **give you your first copy for free and waive your primary copy annual service fee as long as you maintain your *Marketing Services* subscription!**

[Learn More>>](#)

The Key Ingredient to Email Marketing Success

The world is flooded with emails. The typical person receives dozens of emails a day from a wide array of people and organizations. With such crowded inboxes, how can we hope to make an impact with our email marketing? The knee-jerk reaction might be to send more and attempt to take up real estate. But the real answer to finding success with email marketing might surprise you.

[Read More>>](#)

Supporting Braille Institute and its Mission

Cindy Chan, Director of Philanthropy at Braille Institute in Southern California, knows she can rely on the Client Services team at PG Calc. Using *Planned Giving Manager*, she models complex gifts, such as charitable remainder trusts and gifts of real estate, to help her donors achieve their goals. Cindy says, "I am confident that I can speak intelligently and informatively because of the expertise of the people at PG Calc, and I am always learning something new about the power of *PGM*."

Cindy describes the PG Calc team as "detailed" and says "they know planned giving." She concludes by saying "They are experts and give me confidence to navigate gift options for our donors."



[Learn more about Braille Institute](#)

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