



eRate Newsletter

May 18, 2017

### [IRS Discount Rate: June 2.4%](#)

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

### When a Donor Walks Away from a Gift (and the Charity Benefits!)

by Mike Valoris, Senior Consultant

Have you ever hoped that a donor would walk away from a gift? Why would any gift officer want that, unless perhaps the charity was at some risk of liability as a result of accepting the gift? Your goal is to close gifts – to cultivate and engage the donor with the hope of a (big) gift.

Read this month's featured article and find out about various scenarios in which walking away from a gift can make sense for both parties.

[READ FULL ARTICLE >>](#)

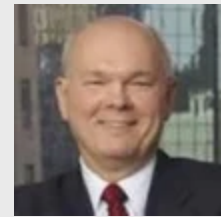
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### UPCOMING WEBINARS

[Gifts of Life Insurance](#)



Presented by  
[Craig Wruck](#)

Thursday, May 25  
1 PM - 2:30 PM ET

[Register](#)

### UPCOMING TRAINING

- [Father Bill's & MainSpring Build Their Marketing Program from Scratch with PG Calc's Marketing Services](#)

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### Quick Tip: How to Reset Your Password in *GiftWrap/Bequest Manager* and *PGM Anywhere*

With *GiftWrap/Bequest Manager* and *PGM Anywhere*, forgetting your password is not a problem! Simply use the **Forgot Password** link on the login page to reset your password. The password reset functions in these applications work similarly, and here are the steps to follow. Please note that Application Administrator passwords must be reset by PG Calc support staff, for security purposes.

1. Click the Forgot Password link on the application login page.
2. Enter client name, username, and email address and click Submit.
3. You will receive one email with your client name and username, and one email with a temporary password. Click the link in the password email.
4. Enter client name, username, and temporary password on login screen. Click Login.
5. For *PGM Anywhere*, enter the temporary password and new password, and verify new password. Click OK, then OK again to confirmation message.
6. For *GiftWrap/Bequest Manager*, enter the temporary password and new password, and verify new password. Click OK, and then login with client name, username, and new password.

That's it! Simple and effective. However, if you continue to have any problems, please contact Client Services at 888-474-2252 or [support@pgcalc.com](mailto:support@pgcalc.com) for assistance.

### PG Calc Sponsors Chronicle of Philanthropy Survey on Marketing Tools & Techniques

Seventy-five percent of non-profits communicate with donors through both traditional and digital media. The most successful non-profits are delivering the right message to the right person, at the right time, and through the right media. Is your organization finding an effective balance? The Chronicle of Philanthropy has just published their findings from a wide-ranging survey on trends in planned giving marketing. PG Calc is pleased to sponsor this survey, and we invite you to read this informative report and find out how other non-profits are achieving this balance. Download your [free report](#) from the Chronicle's website to learn about media mixes that work.

### PG Calc Webinar Recordings Are a Great Way to Spend Spare Budget Dollars

Do you have money left in your budget that needs to be spent before a June 30 fiscal year end? PG Calc's Webinar recordings are a perfect way to spend those leftover dollars, and are available for purchase for

*Lead Trust School*

June 21  
Cambridge, MA

*Planned Giving by the Numbers*

June 22  
Cambridge, MA

*Planned Giving Manager*

July 17-18  
Seattle, WA

August 8-9  
Boston, MA

*GiftWrap*

August 16-17  
Cambridge, MA

[View](#)

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

\$150 each. Each of our Webinars covers a topic in depth with a 60-minute PowerPoint presentation, as well as a detailed paper. Recent topics include “Counting Revocable Gifts: Return from Fantasy Island” with Russell James, “Building Endowment with Planned Gifts” with Jeff Lydenberg, and “Successfully Navigating Gifts of Real Estate” with Mike Valoris. Recordings can be viewed as many times as you wish, making them a great resource for training new staff. Order now from our [website webinar page](#).

You could also purchase one of our trusted manuals – [Charitable Gift Annuities: The Complete Resource Manual](#) (starting at \$225) or [Planned Giving for Canadians](#) (\$100) – or have us add personalized calculations to your next mailing with a [BatchCalcs](#) project (starting at \$500).

### Marketing Corner: It's Time for Gift Planning to Jump on the Bandwagon

Target marketing and list segmentation are typical strategies in fundraising. However, these techniques are rarely applied to planned giving. This is, perhaps, because planned giving mailings are small relative to overall fundraising. Also, segmentation can be time consuming and costly. However, segmentation by gender and age can have a significant impact on planned giving marketing. Find out why and read about some examples in this month's Marketing Corner.

[Read More>>](#)

### Announcing the PG Calc Contest - Where's Zombie?

PG Calc is introducing *Where's Zombie?*, a new contest for all of our friends and customers. The object of the contest is to submit photos of PG Calc zombies in unusual and fun places. You can get your PG Calc zombies by visiting us at any of the planned giving conferences we will be attending during the year.



The rules of our contest are as follows:

- 1. Time period:** Starting now until Labor Day. There will be additional reminders throughout the summer.
- 2. What you have to do to enter:** Send a photo of the zombie doing something interesting, being in an exotic location, or just having fun. Send your photos to [info@pgcalc.com](mailto:info@pgcalc.com) or tweet @PGCalc #huntingforpgcalcbrains.
- 3. What we are doing with the zombies:** Photos submitted will be displayed [prominently on our website](#), along with a caption describing what the zombies are doing and where the photo was taken. If you're willing, we will also name you (the photographer) and your organization.
- 4. Judging:** Entries will be judged on their creativity.
- 5. What you can win:** A free year of *Planned Giving Manager* (PGM) service for your organization (a \$695 value). **If you're**

using our *Marketing Services* and already getting free *PGM*, we'll take another \$695 off your *Marketing Services* fee!

You can obtain an official PG Calc zombie by visiting us at an upcoming [conference](#) or attending a PG Calc [training session](#). Stop by our booth, say hello, and pick up a zombie.

If you have any questions, please do not hesitate to call PG Calc Client Services toll free at 888-474-2252.

See the [Where's Zombie? page](#) on our website for further details and current entries.

### **ACGA Rates Will Remain the Same**

The American Council on Gift Annuities announced on May 8 that it once again would not be changing its suggested maximum gift annuity rates. The ACGA does a formal review of its suggested maximum rates twice a year and has chosen to leave them unchanged since new ACGA rates went into effect on January 1, 2012. By way of explanation for the steady rates, the ACGA notes that while interest rates have fluctuated during the last 5 years, each time their increase or decrease has prompted the ACGA to seriously consider adjusting its suggested maximum rates, interest rates have reversed course.

### **Lead Trust School and Planned Giving by the Numbers**

Be prepared for the toughest donor questions after one of PG Calc's advanced gift planning training courses.

**Lead Trust School** - June 21: Dive into the different types of lead trusts, their investment considerations, funding asset choices, and charitable payment options. You'll walk away from this session being able to convey the benefits of lead trust gift arrangements to prospective donors with confidence.

**Planned Giving by the Numbers** - June 22: Learn the ins and outs of how the numbers you work with every day are computed, and why. Topics will include present value, life expectancy, the charitable deduction, FASB liability and gift annuity reserve calculations, the IRS discount rate's effect on different gift plans, and the taxation of charitable remainder trust payments.

These classes will be held at PG Calc's office in Cambridge, MA. Both classes are approved for 5.5 CFRE continuing education credits or 5.5 CFP points.

[Register now!](#)

### **Father Bill's & MainSpring Build Marketing Program from Scratch with PG Calc *Marketing Services***

Father Bill's & MainSpring (FBMS) has been a client of PG Calc's for the past year. Where previous planned gifts had been largely the result of the late Father Bill's efforts, Lucille Cassis, Chief Development Officer, and Catie Reilly, Associate Director of Development, were faced

with task of expanding the FBMS planned giving program. The first goal was to explore a more extensive marketing plan, with the goal to develop a more robust pipeline of planned givers. Current marketing efforts were limited to a small call-out in the organization's newsletter and a brief mention on their website.

Given the limited availability of resources at FBMS, PG Calc was a natural fit for FBMS. For a modest investment, PG Calc offered FBMS the resources and expertise necessary to create an outward-facing program that required minimal oversight, was consistent with the non-profit's brand, and provided professionally-produced materials necessary to help constituents make informed planned giving decisions.

Catie had this to say about PG Calc *Marketing Services*:

*"Working with PG Calc has by far been the best decision we've made to build up our planned giving program and elevate its exposure. They built our marketing program from scratch, and it wasn't a heavy lift at all on our part. It's tremendous what they have been able to do with the limited resources that we have had – both staff and budget resources. PG Calc has been very flexible in tailoring our marketing to fit the needs of our program."*



[Learn more about Father Bill's & MainSpring](#)

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

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support: 888-474-2252 | [support@pgcalc.com](mailto:support@pgcalc.com)



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