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GIVING
SUCCESS

eRate Newsletter | May 17, 2019

IRS DISCOUNT RATE: June 2.8%

Qualified Charitable Distributions as Part of a Blended Gift Proposal

The planned giving conversation often revolves around shifting the donor's thinking from cash to assets. When you are asking for cash, you are asking small; when you are asking for assets, you are asking big.

Blending planned gifts with outright gifts is an essential part of turning the gift discussion to assets. The Qualified Charitable Distribution (QCD), known to many fundraisers as the charitable IRA rollover, is not a planned gift vehicle per se. Nonetheless, thoughtful gift planning using the QCD can put a valuable asset on the table that may not have been considered by a donor making current gifts.

In this month's featured article, VP Consulting Jeff Lydenberg explores the benefits that accrue to both donor and organization when blended gifts are part of the conversation.

[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

UPCOMING WEBINAR

Understanding Your Gift Annuity Program



Presented by

[Edie Matulka](#)

Thursday,
May 23

1:00 - 2:30 pm ET

[REGISTER](#)

UPCOMING TRAINING

Lead Trust School

June 19, Cambridge, MA

Planned Giving by the Numbers

June 20, Cambridge, MA

Planned Giving Manager

August 7-8, Boston, MA

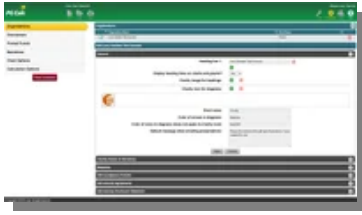
GiftWrap

August 14-15, Cambridge, MA


[VIEW](#)


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Quick Tip: Customize Your Default Email Text in *PGM Anywhere*

Did you know you can email presentations to donors directly from *PGM Anywhere*? Just click  in the Results window. Not only that, in the upcoming *PGM Anywhere* release you can customize the default email message to suit your charity. That way, the email text will need little or no editing every time you send an email through *PGM Anywhere*.

- Log in to *PGM Anywhere*.
- Click Customize.
- Click  next to the Organization Name whose default email text you want to edit.
- Click General to open the General section.
- Scroll down to edit the text that appears in the “Default message when emailing presentations” field.
- After entering your default email message, click Save.

Your default email message will now appear whenever you have that organization selected in Personalization and click the Email icon in Results.

Grab your donor’s attention and save yourself some time in the process. Customize your default email text today!

If you have any questions, email support@pgcalc.com, or call PG Calc Client Services at 888-474-2252.

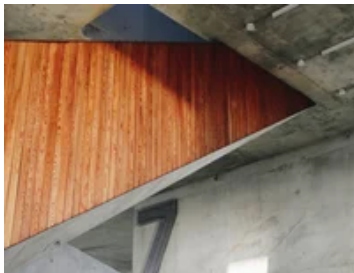


Photo by Derek Torsani on Unsplash

Marketing Corner: Seven Touches

Andi Diehn, Editor at Nomad Press, writes the following:

“There’s a theory in marketing that a potential customer needs to be exposed to your brand at least seven times before deciding to buy—it’s called the rule of seven. Of course, that number was decided on by movie studio executives in the 1930s, way before social media hit our screens and changed everything. So how many interactions do marketers need now?”

What struck me about this revisit of an old idea is how we have to consider effective marketing a combination of the number of touches and the quality of those touches. That hasn’t changed in almost 100

years, even in today's world where most people are bombarded with messages of all kinds through social media.

The pervasiveness of social media notwithstanding, planned giving marketers rely heavily on direct mail. With so many planned giving pieces arriving at houses across the country, it's essential to remember that it's as much about the people who setup gift annuities and bequests and transform your charity as it is about the gift vehicles. Perhaps more importantly, your seven opportunities must be more interesting to your prospective donors than all the other communications they are receiving, ensuring that you get "tuned in" rather than "tuned out." Make the most of the chances you have with the people who are waiting to be inspired by your seven messages.

PG Calc Blog

The latest on planned giving from PG Calc.

Latest PG Calc Blog Post

UIC Deduction Remains Available after 2017 Tax Act

Following the December 2017 passage of the 2017 Tax Act, some in the gift planning community raised the question of whether the 2017 Tax Act's elimination of miscellaneous itemized deductions extended to the deduction for unrecovered investment in contract (UIC) at the death of the last annuitant of a charitable gift annuity...

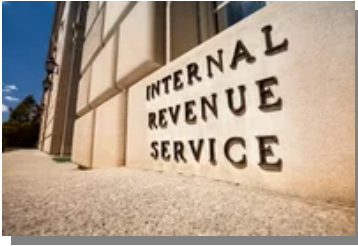
[READ MORE](#)





New PGM Anywhere Release Offers Designer Proposals Module and Much More

PG Calc plans to release the latest version of *PGM Anywhere*, our web-based software for illustrating planned gifts, the week of May 20. Among the many exciting enhancements included in this release is a *Designer Proposals* module. This optional module enables you to create in minutes a gift proposal that combines the visual impact of a professionally-designed brochure with images, text, and calculations personalized for your donor. For more information on the *Designer Proposals* module, and whether you are eligible to get it for free, [go here](#). More information on this *PGM Anywhere* release will be included in the upcoming PG Calc-U-Letter.



New Mortality Table for Computing Charitable Deductions Expected Any Moment

Section 7520(c)(2) of the Internal Revenue Code requires the Secretary of the Treasury to revise the mortality table used to compute charitable deductions for split-interest gifts, such as gift annuities and charitable remainder trusts, no less frequently than once every 10 years. The last time this mortality table was updated was April 30, 2009, effective July 1, 2009. We have been keeping a close watch for an announcement of a new mortality table, but have not seen one as of this writing. We expect it to be announced shortly and are poised to update all our software that makes use of this table in short order once the new table is announced. We will inform all of our *Planned Giving Manager*, *GiftCalcs*, and *GiftWrap* customers when the new mortality table is available in their software.



LeTourneau University Foundation Experiences Sustained Growth with Help From PG Calc

LeTourneau University began as a technical institute in 1946 and has evolved into a regionally accredited, nationally-acclaimed Christian Polytechnic University. LeTourneau University is consistently ranked in the top tier among “America’s Best Colleges” and “Best Engineering Programs” by US News and World Report. Until recent years, their planned giving efforts and total endowment value hovered in the single digits, but today has grown substantially. To further grow their endowment, and out of a need to

help their constituents in their estate and legacy planning, the LeTourneau University Foundation has been formed to be that financial long range planning arm of the University – and that entity to which it can assign this all-important, and all-encompassing, area of responsibility.

LeTourneau donors are amenable to doing something meaningful for the University, both now and in the future, and they have the capacity to give, but they don't always know from where those dollars might best come. PG Calc's *Planned Giving Manager (PGM)* software allows the Foundation to be part of those important discussions – with detailed gift plan proposals that are on par with what many high net worth individuals and their advisors want to see. University planned giving staff can quickly drill down on the impact tax favorability can have upon a given gift plan – for both the donor and the University. Using *PGM* gives the University the ability to plan for the future – which is becoming increasingly essential for higher education institutions, and Christian higher education institutions in particular!

Thomas Bevan, Executive Director of the LeTourneau University Foundation, had this to say about PG Calc:

“It’s been my privilege to get to know Director of Sales David Wolfe in these recent years, and benefit from his experience in this space. I’ve equally benefitted from my interactions with PG Calc President Gary Pforzheimer, as well as Bill Laskin, VP of Product Management. Andrew Palmer and his Marketing Services team have been responsive to our suggested changes to our website and to our marketing ideas overall – with execution on their part that is excellent. Finally Tina Yelle and her Client Services team worked patiently with us as we integrated our CRM with PGM in an essential effort at getting cross visibility to our constituency. We’re confident that we have in PG Calc a partner in planned giving that can assist us in growing our University’s endowment by giving us the right tools and the right messages to inform our interactions with our many friends and alumni of our beloved University.”

Learn more about [LeTourneau University](#).

Learn more about [PGM](#).



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