eRate Newsletter

February 18, 2016

IRS Discount Rate: March 1.8%

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

Planned Giving In a Volatile Market

The year ending December 31, 2015 was historic and monumental - the earth shifted violently beneath our feet, rivers changed courses, truisms were shattered, and fear was pervasive. Desperate times drove desperate actions, and good men and women scrambled in panic to find stable ground. It suddenly seemed that nothing was safe anymore. *No, we're not talking about the presidential race – we're talking about the U.S. stock market.* For the first time in seven years, we didn't come out ahead of where we started. Of the three major U.S. stock indices, two of them ended the year below their price levels on January 1.

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IN THIS ISSUE

UPCOMING WEBINAR

The Best - And Most Ignored - Source for New Planned Gifts

Presented by Mike Valoris

Thursday, February 25th
1 PM - 2:30 PM EST

Register

UPCOMING TRAINING

- ***PGM* 7.3 Release: *PGM* Incorporates 2016 Indexed Tax Table**
- ***PGM Anywhere* Release: *PGM Anywhere* Now Can Produce Narratives**
- **Reminder: There's Still Time to Sign Up for the PG Calc 2016 Webinar Series**
- **Sign Up for Craig Wruck's *Fundmentals of Planned Giving* Webinar Series Today!**
- **The United Church of Christ Solves a Gift Administration Problem**

Quick Tip: Compare Different Gift Amounts in *PGM Anywhere*

Sometimes you want to compare for a donor the benefits of funding a planned gift with two different gift amounts. For example, you might want to show the benefits of a gift annuity funded with $10,000 versus $25,000.

The good news is that *PGM Anywhere*, PG Calc's gift illustration software for tablets and desktop computers, makes it easy to compare gift amounts side-by-side.

1. Open Gift Options and tap under Add A Gift Option the type of gift you wish to compare.
2. In the follow-up window for the gift, choose the property type, then enter the gift amount and, if applicable, the cost basis. Tap Done.
3. Choose the type of gift a second time under Add A Gift Option.
4. Repeat Step 2, but enter the second gift amount and cost basis (if applicable) that you want to compare.
5. Open Presentations and tap Comparison of Benefits under Select Presentations.
6. Tap Results.

The Comparison of Benefits will compare the deduction and payment amount of the two alternatives side-by-side. The same steps also let you compare a gift plan funded with cash versus one funded with appreciated stock.

Marketing Corner: What Are Your Keystone Habits?

Most of us have more work than we have time for. Prospecting, donor calls and donor visits, stewardship, donor reports and updating activity records, marketing, department meetings, gift/estate administration, leadership and board reporting, all compete for our attention. Success does not rely on getting it all done, however, it does rely on getting the ***right*** things done. That's where planned giving marketing can have its challenges. Marketing programs often suffer in the execution, but it's not so much a failure to execute – it's a failure to execute the right things. And this applies to organizations with a dedicated planned giving staff, as well as organizations in which planned giving is part of the overall fundraising function.

Gift Planning with *Planned Giving Manager*

March 14-15
Chicago, IL

April 5-6
St. Louis, MO

April 27
Houston, TX

Gift Administration with *GiftWrap*

April 28-29
Cambridge, MA

View

www.pgcalc.com

Organizations that have a planned giving staff tend to obsess over brand and copy at the expense of other things that are equally if not more important, such as list selection, prospecting, research, and stewardship.

Organizations that don't have a planned giving staff offer all sorts of explanations for why they can't consistently promote their planned giving program, citing limited time, lack of priority, and conflict with their annual giving program, to name a few.

In either case, if the focus were on the appropriate goal, task, or *habit*, then planned giving marketing wouldn't have to be all-consuming, intimidating, or overwhelming.

Read More>>

PGM 7.3 Release: *PGM* Incorporates 2016 Indexed Tax Tables

On February 12, we released the latest version of *Planned Giving Manager*. *PGM 7.3* includes federal tax tables updated with 2016 indexing for inflation, such as this year's $5,450,000 estate and gift tax exemption amount. *PGM 7.3* also includes a variety of small enhancements and a few fixes of minor bugs. If you are a *PGM* client, please install *PGM 7.3* as soon as convenient, if you haven't already. If you haven't received our update email or have questions about your update, our Client Support team would love to help you. You can reach them at support@pgcalc.com or 888-474-2252.

PGM Anywhere Release: *PGM Anywhere* Now Can Produce Narratives

In late January, we were excited to release a major update of *PGM Anywhere*, our browser-based software for creating planned gift illustrations on a tablet, laptop, or desktop computer. This new version of *PGM Anywhere* can produce all of the narratives that *Planned Giving Manager* (*PGM*) can produce, including custom narratives. For example, now you can use *PGM Anywhere* to create gift descriptions, proposal letters, and gift annuity agreements for all 50 states! If you are a *PGM* client, we encourage you to sign up for *PGM Anywhere* so you can take advantage of all its great features.

Learn more>>

Reminder: There's Still Time to Sign Up For the PG Calc 2016 Webinar Series

We have a great schedule of Webinar topics and presenters lined up for 2016 and hope that you and your colleagues will join us for some or all of these sessions. Each 90-minute session is packed with practical information that will help you do your job better, and includes a pdf of the presentation slides and a paper that covers all the content of the presentation. Sign up for all 12 monthly Webinars and save! We'll send you a replay of January's presentation and any others you've missed. We will broadcast our next Webinar, The Best - And Most Ignored - Source for New Planned Gifts, on February 25th.

Click here to learn the details of this year's Webinar series and to register.

Sign Up for Craig Wruck's *Fundamentals of Planned Giving* Webinar Series Today!

PG Calc is excited to be hosting Craig Wruck's *Fundamentals of Planned Giving* webinar series. Craig will present the first of four weekly 90-minute sessions on March 2. Over the four presentations, Craig will cover tax fundamentals, basic planned giving methods, assets used for charitable contributions, and advanced planned giving methods. Don't miss this convenient and economical opportunity for you and your colleagues to learn the basics of planned giving from a nationally-prominent expert and widely-admired teacher!

Learn more>>

The United Church of Christ Solves a Gift Administration Problem

The United Church of Christ (UCC) has been a long-time PG Calc client, having started their relationship, as so many clients do, with the purchase of multiple copies of our *Planned Giving Manager* software.

And, like so many organizations, the UCC was faced with the problem of managing a growing planned giving program, effectively servicing a growing donor base, and ensuring the integrity of the program all the while. The UCC initially solved the problem of planned giving program management and administration by developing a home-grown FileMaker donor database. Many of you may not be old enough to remember FileMaker, and that's OK. As their program grew, it was clear to the UCC that they needed more sophisticated solution. In 2010, PG Calc brought the web-based *GiftWrap* gift administration application to market, and having learned about *GiftWrap*, there was no question among UCC staff that they would move to *GiftWrap*.

As a satisfied *GiftWrap* user for a number of years, Lynne Hansen, now Associate for Legacy Gifts for the UCC and United Church Funds (UCF), notes that donors are happy because their questions and needs receive prompt and competent attention, and she attributes this, in part, to her use of *GiftWrap*. Lynne further notes that the stability and integrity of the UCC/UCF planned giving program is largely attributable to *GiftWrap*, without which she estimates there would be total chaos. Lynne had this to say about *GiftWrap*:

"Our Planned Giving office is a channel for establishing life-income gifts to benefit hundreds of United Church of Christ-related institutions. The amazing GiftWrap database enables us to not only organize donor and gift information, but also to access it with ease, produce gift reports, print tax documents, and carry out all administrative functions with a maximum of accuracy and efficiency. However, equal to the product itself is the

exceptional support that comes along with it – whenever I ask PG Calc staff a question about a GiftWrap process or our particular applications, I always receive a response that is highly knowledgeable and exceptionally thorough. I simply can't imagine doing Planned Giving ministry without GiftWrap!"

We invite all clients to contact us with your gift planning questions large and small. Call 888-474-2252 or email support@pgcalc.com.

Learn more about the United Church of Christ >>

sales: 888-497-4970 | info@pgcalc.com
support: 888-474-2252 | support@pgcalc.com