



eRate Newsletter

February 17, 2017

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

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

Taking the Temperature of Your Gift Annuity Program (And What To Do If It Is Unwell!)

Fundraisers consider a well-functioning gift annuity program the cornerstone of a robust planned gift fundraising effort. Although bequests and beneficiary designations produce most of the realized planned gift revenue, offering gift annuities is usually the



mark of a mature planned giving program. Nonetheless, among those charities that have offered gift annuities, many frequently worry about the continued viability of offering them.

Read about the the characteristics of a healthy gift annuity program, and what to do if your program is in trouble.

[READ THE FULL ARTICLE >>](#)

[PRINT THE FULL ARTICLE >>](#)

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UPCOMING WEBINARS

[Building Endowment with Planned Gifts](#)



Presented by
[Jeff Lydenberg](#)

Thursday, February 23
1 PM - 2:30 PM ET

[Successfully Navigating Gifts of Real Estate](#)



Presented by
[Mike Valoris](#)

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

 [Register](#)

UPCOMING TRAINING

Planned Giving Manager

March 14-15
Columbus, OH

April 5-6
Atlanta, GA

- [GiftCalcs Enhancements Released on Feb. 9 with More to Come](#)
- [North Central College Gets Guidance on Industry Best Practices](#)

Quick Tip: Exporting from *PGM Anywhere* into Word and PDF

The ability to run gift calculations on the fly is critically important for today's planned giving professional. Web-based *PGM Anywhere* combines the accuracy and reliability of PG Calc's *Planned Giving Manager* with the flexibility of a mobile app. Among its many great features is *PGM Anywhere*'s ability to export presentations to Word and PDF, making it easy to share illustrations with prospects and their advisors from, well, anywhere.

As in *Planned Giving Manager*, *PGM Anywhere* allows you to click on an icon at the top of the Results window to export the results seamlessly into Word. Once in Word, you can save the file and send it to a donor or the donor's advisor (or both) as an email attachment. *PGM Anywhere* also lets you export directly to PDF. Unlike a Word document, a PDF document cannot be altered easily in the way that a Word document can. Sending PDF versions of gift calculations and illustrations minimizes the possibility of any inadvertent or deliberate changes to the information, and is easy for donors to open. If you wish, you can use *PGM Anywhere*'s email feature, also available by clicking an icon at the top of the Results window, to generate an email with a PDF of your presentation attached.

Please feel free to contact us at support@pgcalc.com or 888-474-2252 if you have any questions or comments about the export options in *PGM Anywhere*.

Get A Qualified Appraisal Before Filing 1040 for 2016

Planned giving donors who made a gift of their life income interest in 2016 need to obtain a qualified appraisal and a Form 8283 signed by the appraiser and donee charity before they file their 2016 federal income tax return. The 2016 Form 1040 is due April 18, 2017, and can be extended until October 16, 2017, but a lot of donors want to file right away.

Without a qualified appraisal and signed Form 8283, the donor could lose the income tax deduction for the gift. PG Calc's *Qualified Appraisal Service* can help. We've done appraisals for early terminations of gift annuity contracts, charitable remainder trusts, retained life estates, and other special situations. We are happy to be engaged by the charity or directly by the donor. Our website contains [more information](#), including a [pricing schedule](#) and answers to [frequently asked questions](#). To get started, contact Winston Jones at winston@pgcalc.com, who can email a list of documents needed for a particular gift type.

Note: Qualified appraisals are required for noncash gifts other than publicly traded securities, which includes a range of gift situations. Real estate appraisers are relatively easy to find. For life insurance contract appraisals, we can recommend appraisers, one of whom also does artwork. Finding an appraiser for closely held business interests, non-

April 26-27
Boston, MA

GiftWrap

May 8-9
Cambridge, MA

 [View](#)

www.pgcalc.com

publicly-traded securities, or tangible personal property often requires some legwork.

Marketing Corner: Should You Be Concerned About USPS "Marketing Mail?"

Recently the United States Post Office made a decision to change the classification that was referred to as "standard mail" to "marketing mail." This is a topic of some concern among nonprofits because anything that was referred to as direct-mail that was marked with the word "standard" will now read "marketing." The current thinking is that more recipients will throw out the mail because of the change in labeling.

[Read More>>](#)

Webinar: Successfully Navigating Gifts of Real Estate

Many gift officers shy away from discussing gifts of real estate due to the complexity and liability that these gifts might bring to their organization. Call it the fear factor. Yet, current strategies being used by charities, both large and small, are effectively shifting the risk associated with gifts of real estate, thus opening doors to a significant source of support.



Our webinar on March 30 will address how to successfully navigate gifts of real estate, starting from discussions with donors through to accepting and liquidating the property. With the real estate market booming in many sections of the country and donors owning properties with significant value, learn how your organization can reap philanthropic rewards from gifts of real estate while prudently managing any potential liability.

[Register>>](#)

GiftCalcs Enhancements Released on Feb. 9 with More to Come

On February 9, we released the first of a series of updates planned for the next couple of months that will enhance *GiftCalcs*, PG Calc's online planned gifts calculator. This first release adds a new All Gifts diagram, includes a separate organization nickname for use in diagram labels, and improves diagram labeling for pooled income funds and flip unitrusts. Stay tuned for announcements of more *GiftCalcs* improvements in the next several eRates!

[Learn More>>](#)

North Central College Gets Guidance on Industry Best Practices

Brandon Hoefft, Director of Planned Giving at North Central College

(Naperville, IL), is a new PG Calc client. His organization recently secured a charitable remainder unitrust and a fine art collection. Brandon contacted PG Calc with a question about industry best practices and PG Calc's president, Gary Pforzheimer, directed him to our Client Services staff. Here is what Brandon had to say about the interaction:

"I just spoke with PG Calc -- what an awesome resource!!! As a new planned giving director, I feel much more confident in my ability to navigate complex gifting opportunities because I have a team of subject matter experts that I can count on at the most critical points in the planned giving fundraising process. Thank you for the great product and service that your company provides."

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