



eRate Newsletter October 19, 2016

IRS Discount Rate: November 1.6%

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

Are You Ready for the End?

The end of the year, that is. A study conducted by the Center on Philanthropy at Indiana University found that 42.7 percent of surveyed high-net worth donors gave more during the holidays than during the rest of the year. Are you focused on year-end giving?

The end of the calendar year is also a good time for planned giving departments to focus on a variety of activities. In this article, I will discuss year-end activities like tax preparation for life income gifts, determining the adequacy of gift annuity reserves, marketing planning, and year-end reminders for donors. Be ready for 2017!



[READ THE FULL ARTICLE >>](#)

[PRINT THE FULL ARTICLE >>](#)

UPCOMING WEBINARS

[Pros and Cons of Email Marketing of Planned Gifts](#)



Presented by [Andrew Palmer](#)

Thursday, October 27
1 PM - 2:30 PM ET

[Bequests and Simple Bequest Alternatives](#)



Presented by [Mike Valoris](#)

Thursday, November 17
1 PM - 2:30 PM ET

 [Register](#)

UPCOMING TRAINING

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Quick Tip: Did You Know PGM Anywhere Can Produce Custom Documents?

Planned Giving Manager (PGM) and *PGM Anywhere (PGMA)* can produce ten different Narratives that incorporate calculated values and entered values into formatted text. Did you know that *PGM* and *PGMA* can also produce documents created just for your organization? PG Calc can modify any of the Narratives these applications produce, such as the Gift Annuity Agreement or Proposal Letter, so that they include the exact text you want every time. You won't need to export them to Word and edit them each time, anymore. We've done this sort of customization for hundreds of clients.

We also can create completely new Narratives from scratch, for example so that you can produce gift annuity agreements using your organization's own agreement language or specific internal documents whenever a planned gift is completed. Once your custom Narrative is in place, it will save you time and reduce mistakes every time you produce it.

Any custom narrative we create for you will work equally well in *PGM* and *PGMA*. Contact Bill Laskin at blaskin@pgcalc.com or 888-474-2252 for more information.

Join PG Calc's Client Services Team

PG Calc is looking for an individual with experience in planned giving to fill a full-time position in Client Services in our Cambridge, MA office. Principal responsibilities include providing client support on planned giving concepts and the use of PG Calc software, conducting training classes, writing communications and articles, and participating in special projects. Competitive candidates must have excellent communication skills and a strong interest in planned giving.

Call me at 888-4-PGCALC (888-474-2252). Alternatively, e-mail or mail a cover letter and résumé in confidence with salary requirements to:

GiftWrap

November 3-4
Cambridge, MA

Planned Giving Manager

October 20-21
Dallas, TX

November 14-15
San Francisco, CA



www.pgcalc.com

Tina Yelle
Vice President/Director Client Services
tyelle@pgcalc.com

[Learn More>>](#)

Marketing Corner: Another Touch Point

This summer, PG Calc wrote a blog post entitled "[Transforming Life Income Gifts into Current Gifts](#)." The post was informative and thoughtful, but there was a golden nugget in that post that should be emphasized. Sometimes, *stewardship* can be the most effective strategy for securing an additional gift.

[Read More>>](#)

Webinars Scheduled for 2017

We are very excited about the webinars we have planned for 2017. Within the next few weeks we will be posting a description of each webinar to our website and start accepting registrations. If this eRate arrived in your inbox, you will receive an email when we're ready. In the meantime, here's what you have to look forward to!

Presenter	Title
Russell James	Counting Revocable Gifts
Jeff Lydenberg	Building Endowment with Planned Gifts
Mike Valoris	Gifts of Real Estate
Alan Cantor	Attracting Gifts from Donor Advised Funds
Jeffrey Frye	Taxation Basics/Intermediate for Gift Planners
Andrew Palmer	Planned Giving Marketing for Starting or Restarting a Program
Jade Bristol Verity	Bequest Administration to Boost Planned Gifts
Edie Matulka	Planned Giving 101
Lisa Mayfield	Understanding/Working with the Elderly
Jeff Lydenberg	Gifts of Retirement Assets
Craig Wruck	Gifts of Life Insurance
Gary Pforzheimer	Gift Acceptance Policies

PGM Anywhere Release Includes Several Important Enhancements

On October 8, PG Calc released an important update of *PGM Anywhere*, our browser-based planned gift illustration software for tablet, laptop, and desktop computers. *PGM Anywhere* can now produce Actuarial Calculations and Non-Charitable Interest Actuarials charts for all standard planned gifts. These step-by-step charts include formulae and legal citations, where appropriate, to help donors substantiate their charitable deductions and other tax calculations. The

update also includes enhanced password reset security. All *Planned Giving Manager* clients can sign up for *PGM Anywhere* for no additional charge!

[Learn More>>](#)

With Its Latest Release, *GiftWrap* Continues To Be the Industry Standard

Year	Gift Type	Gift Value	Account #	For Lifetime Annuity	Market Value	Projector Value	PG (B/P)	PG (B/P)
2009	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2010	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2011	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2012	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2013	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2014	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2015	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2016	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2017	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2018	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2019	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2020	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2021	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2022	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2023	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2024	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2025	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2026	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2027	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2028	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2029	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2030	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2031	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2032	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2033	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2034	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2035	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2036	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2037	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2038	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2039	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2040	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2041	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2042	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2043	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2044	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2045	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2046	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2047	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2048	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2049	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2050	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2051	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2052	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2053	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2054	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2055	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2056	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2057	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2058	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2059	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2060	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2061	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2062	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2063	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2064	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2065	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2066	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2067	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2068	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2069	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2070	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2071	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2072	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2073	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2074	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2075	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2076	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2077	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2078	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2079	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2080	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2081	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2082	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2083	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2084	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2085	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2086	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2087	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2088	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2089	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2090	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2091	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2092	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2093	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2094	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2095	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2096	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2097	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2098	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2099	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19
2100	Gift	\$10,000.00		\$1,000.00	\$1,148.19	\$1,148.19	\$1,148.19	\$1,148.19

The latest update of GiftWrap, which is version 4.2.9, will be released in early November, and will contain a number of enhancements and bug fixes. Among the enhancements is

support for the [2012 IAR mortality table](#) for use with GiftWrap's Projected Remainder Amounts report. This table is an improvement over prior mortality tables in that it is derived from the most recent data, and it is generational, such that projected mortality improvements are incorporated into the table every year. Other enhancements include user-initiated password reset, as well as a variety of security enhancements.

[Learn More>>](#)

The University of California Uses *GiftWrap* To Ensure the Health of their Planned Giving Program

Suzanne Cross has the enormous task of administering the University of California Regents planned giving program. On a daily basis, Suzanne reviews and processes new gifts, approves all tax filings, monitors projected remainder values, coordinates and submits gift annuity required state filings, and prepares planned giving liability data for the University's Annual Financial Report. In addition, Suzanne acts as liaison on donor relation issues with all ten UC campuses.

On occasion, Suzanne needs confirmation or assistance and she is always able to get that assistance from PG Calc. Suzanne is never hesitant to dial PG Calc's number, as she knows she will get the answer she seeks.

"Last week, I wondered if there was any way to simplify my campus gift separation of Projected Remainder Amounts from the aggregate report. Slightly concerned that I was overstepping my question allotment, I proceeded to phone PG Calc and Tina Yelle showed me how to apply custom filters within the GiftWrap Projected Remainder Amounts report to generate exactly what I needed.

Tina saved me hours of massaging data reports, and I replied: I cannot tell you how excited I am that this worked like a charm!!"

UNIVERSITY OF CALIFORNIA

[Learn more about GiftWrap>>](#)

[Learn More about the University of California>>](#)

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