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SUCCESS

eRate Newsletter | October 17, 2017

## IRS DISCOUNT RATE: November 2.4%

### His, Hers, or Theirs - You Need to Find Out!

There is one important – and often overlooked – question to ask spouses who are funding a charitable gift annuity (CGA) with appreciated securities: “Who owns the securities?”

Not knowing the answer to this question can result in a triggering of capital gains taxes never anticipated by the donors, and a donor relations nightmare for the gift officer. Because of the unlimited federal marital deduction for both lifetime gifts and estate assets passing between spouses, gift officers tend to ignore the tax implications when spouses are funding a charitable gift annuity with appreciated assets.

[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

#### UPCOMING WEBINARS

##### Gifts of Retirement Assets



Presented by  
[Jeff Lydenberg](#)

Thursday,  
October 26  
1:00 - 2.30 pm ET

##### Intermediate Taxation for Gift Planners



Presented by  
[Bill Laskin](#)  
and  
[Jeffrey Frye](#)

Thursday,  
November 16  
1:00 - 2.30 pm ET

[REGISTER](#)

#### UPCOMING TRAINING

##### *GiftWrap*

November 2-3, Cambridge, MA

##### *Planned Giving Manager*

February 8-9, New York, NY

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## Quick Tip: PDFs Make Your Presentations Look Great!

You can send your donors gift illustrations in PDF format from both *Planned Giving Manager (PGM)* and *PGM Anywhere*. Recently, many clients have asked how to do this. Let's start with *PGM*, and its two-step process:

1. First you edit your presentation in MS Word, either by selecting the *PGM* "Edit in Word" item from the File menu, or clicking the "W" icon on the *PGM* toolbar.
2. Once you have the presentation open in Word, you can save it as a PDF. The options differ depending on the version of Word you are using, but typically you can select "Export" or "Save As PDF" from the Word File menu.

*PGM Anywhere* lets you export your presentation directly to PDF. After you have created your presentation, tap Results to view, then click the PDF icon in the toolbar at the top. You will be prompted to save the resulting PDF document.

A second *PGM Anywhere* option allows you to attach a PDF of your presentation to an email message. Tap Results or Export to view, then simply select the "Email" button on the top *PGM Anywhere* toolbar of your presentation. You will notice in the email popup window that the PDF is automatically attached.

*PGM Anywhere*, our web-based planned gift illustration software for desktop, laptop, and tablet computers, is available to all *Planned Giving Manager* clients for no additional charge. To get started, [click here](#) and submit the form on the "I use PGM Sign Me Up" tab. Alternatively, you may contact [support@pgcalc.com](mailto:support@pgcalc.com), or call 888-474-2252.

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## Marketing Corner: NCPP 2017 Marketing Nuggets

Having just returned from the [National Conference on Philanthropic Planning](#), I thought it would be timely to share a few marketing takeaways. While there is nothing revolutionary to report, it's always nice to talk with colleagues about their marketing successes and challenges. Here's what I gleaned from the sessions I attended.



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## 2018 Group Training Schedule

Are you getting the most out of your software? Is there a new staff member at your organization who could benefit from introductory software training? PG Calc offers group training that supports our clients and helps them maintain a successful planned giving program. Training also aids in staying current with the latest trends in planned giving. Taught by experienced PG Calc staff members, the courses are designed to provide valuable planned giving knowledge and insight.

If you have any questions, contact Client Services at 888-474-2252, or [support@pgcalc.com](mailto:support@pgcalc.com).

DOWNLOAD FULL SCHEDULE

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## 2018 Webinar Schedule

PG Calc Webinars bring the skill and experience of the industry's top practitioners to your office! PG Calc consultants and carefully selected guest presenters deliver the most up-to-date knowledge and insights on important gift planning topics. Guest presenters include Erik Dryburgh of Adler and Colvin, Craig Smith of John Brown Limited, Russell James of Texas Tech University, and Laura Hansen Dean of the University of Texas at Austin. Craig Wruck, of Humboldt State University, will once again be presenting the *Fundamentals of Planned Giving* series.

Each Webinar includes 60 minutes of formal presentation and 30 minutes of Q & A with the presenter, a paper, and a PDF of the slides.

If you have any questions, please contact our Client Services team at [support@pgcalc.com](mailto:support@pgcalc.com) or 888-474-2252.

DOWNLOAD FULL SCHEDULE

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## Don't Lose Automatic IRS Discount Rate Updates to PGM!

*Planned Giving Manager (PGM) 7.4A*, released on September 14th, is designed to work with a security upgrade that was applied to our server on October 16, 2017. As of that date, you must have *PGM 7.4A* installed in order to continue getting automatic IRS discount rate downloads each month. See our "*PGM 7.4A* is available for download"

email of September 14 for instructions. Alternatively, you can enter new IRS Discount Rates manually until you install *PGM 7.4A* or a later version.

For more information, contact Client Services at 888-474-2252 or [support@pgcalc.com](mailto:support@pgcalc.com)

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## PG Calc Zombie Contest Ending Soon

It's been an exciting fall during which we have received a number of clever, interesting, and creative entries to our **Where's Zombie?** contest. The time is drawing near, however, when we will have to call a halt to the contest. But there is still time! We will be accepting entries up to October 31st. So get out there, find an interesting location, and snap a picture of your PG Calc zombie. Let your inner zombie come out and seek the brains he or she so richly deserves!



Remember, the winner will get a free year of *Planned Giving Manager (PGM)* service for your organization (a \$695 value). If you're using our *Marketing Services* and are already getting free *PGM*, we'll take another \$695 off your *Marketing Services* fee!

So take a winning picture and send it to [info@pgcalc.com](mailto:info@pgcalc.com)!

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## The American Mathematical Society Relies on PG Calc for Advice on Their Planned Giving Program

The American Mathematical Society (AMS) created its Development Office in 2011. Over the next six years, the Office worked steadily to establish a comprehensive fundraising program that embraced best professional practices, and was well integrated into the AMS culture and infrastructure. During that time, focus was given to increasing program visibility and results, and to establishing face-to-face relationships with donors across the United States. With those elements well underway, the AMS turned its sights to expanding its planned giving program.

The AMS Development Committee needed to determine whether or not to offer charitable gift annuities. The Committee asked PG Calc to conduct an assessment to help inform their decision-making. PG Calc's assessment addressed the CGA question, as well as providing a number of useful recommendations for the Committee's consideration. Robin Marek, Director of Development, had this to say about the PG Calc engagement:

*“The assessment PG Calc conducted for the American Mathematical Society in 2016 continues to provide a valuable roadmap. Their recommendations were sound and have helped our Development Committee take strategic steps forward as we grow our planned giving program.”*



Learn more about the [American Mathematical Society](#).

Learn more about [PG Calc Consulting Services](#).



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