



eRate Newsletter September 19, 2016

IRS Discount Rate: October 1.6%

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

15 Tips on Getting More Donors to Read Your Emails

There's always that moment of doubt right after you hit send on a carefully crafted email to your donors that no one will open the email.

While you can never guarantee a stellar open rate, there are some best practices you can apply to all of your email marketing initiatives that should help you see an increase in open rate over time.



[READ THE FULL ARTICLE >>](#)

[PRINT THE FULL ARTICLE >>](#)

IN THIS ISSUE

- [Quick Tip: Now Is a Good Time to Run GiftWrap 'Verify Person and Gift Data'](#)
- [Join PG Calc's Client Services Team](#)

UPCOMING WEBINAR

[Gift Planning in a Capital Campaign](#)



Presented by [Lynn Malzone Ierardi](#)

Thursday, September 29
1 PM - 2:30 PM ET

 [Register](#)

UPCOMING TRAINING

Planned Giving Manager

September 22-23
Washington, DC

October 20-21
Dallas, TX

November 14-15
San Francisco, CA

GiftWrap

November 3-4
Cambridge, MA

 [View](#)

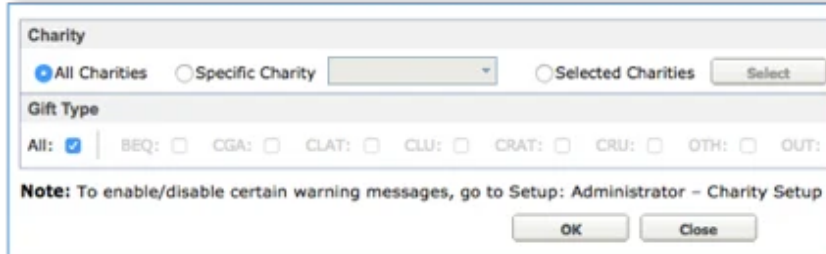
- [Marketing Corner: Why Print Will Never Die](#)
- [What Webinar Would You Like to Attend?](#)
- [CGA Manual Is the Go-To Resource for Gift Annuities](#)
- [When Only a CRAT Will Do](#)
- [Marietta College Gets a Head Start Thanks to Marketing Services](#)

Quick Tip: Now Is a Good Time To Run *GiftWrap* 'Verify Person and Gift Data'

As we approach year end, it is a good idea to run the *GiftWrap* Verify Person and Gift Data utility. This utility will alert you to any broken or inconsistent data. You should address all identified issues to insure that you will have the most accurate and well-groomed data heading into the new year.

To run the Verify function, do the following:

1. Log into *GiftWrap*
2. Select Verify Person and Gift Data from the Utilities menu (first item in the list)
3. Accept the defaults for charity and gift type, or select specific instances of each
4. Click OK
5. Once the Verify results log displays, click either the Print Log or Print to File buttons, depending upon your choice
6. Review the log and remediate all issues



The screenshot shows a dialog box titled "Charity" with the following options:

- All Charities
- Specific Charity [dropdown menu]
- Selected Charities [Select button]

Below this is the "Gift Type" section with radio buttons for:

- All:
- BEQ:
- CGA:
- CLAT:
- CLU:
- CRAT:
- CRU:
- OTH:
- OUT:

A note at the bottom reads: "Note: To enable/disable certain warning messages, go to Setup: Administrator - Charity Setup". At the bottom right are "OK" and "Close" buttons.

Prior to running the Verify utility, enable or disable selected warning messages as follows:

1. Select Administrator - Charity Setup from the Setup menu
2. Click on your charity
3. Under the Verify Person and Gift Data - Settings, click on the messages you want to suppress (we recommend against suppressing mismatches of \$1 or more)

| Verify Person and Gift Data - Settings | |
|---|--------------------------|
| Suppress Pay to The Order Of Warnings: | <input type="checkbox"/> |
| Suppress Missing Joint Mail Information Warnings: | <input type="checkbox"/> |
| Suppress Payment/Tax mismatches of less than \$1: | <input type="checkbox"/> |
| Suppress Payment/Tax mismatches of \$1 or more: | <input type="checkbox"/> |
| Suppress Payout %/Payment Amount mismatches of less than \$1: | <input type="checkbox"/> |
| Suppress Payout %/Payment Amount mismatches of \$1 or more: | <input type="checkbox"/> |

Join PG Calc's Client Services Team

PG Calc is looking for an individual with 3+ years of 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.

E-mail or mail cover letter and resume in confidence with salary requirements to:

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

[Learn More>>](#)

Marketing Corner: Why Print Will Never Die

Nowadays, we live our lives online. Everywhere you go, people are on their phones and capturing real life to be saved for some unknown time in the future. All of this digital ephemera has placed a renewed value on physical and print media. Keep that in mind in your marketing efforts.

[Read More>>](#)

What Webinar Would You Like to Attend?

Each month for the last nine years, PG Calc has presented a webinar on a topic of interest to gift planners. Whether the topic is a specific giving technique, marketing advice, or tips on how to have more effective conversations with donors, the common thread is to help our clients raise more money through planned gifts.

We are about to start our planning for next year's webinar series and we would love to hear from you regarding the topics you would like to learn about and the presenters you would like to learn from.

If you would like to suggest topics and/or presenters for our webinars, please email Bill Laskin at bill@pgcalc.com with your suggestions.

To see our webinar topics for the rest of 2016, [click here](#).

CGA Manual Is the Go-To Resource for Gift Annuities

PG Calc's *Charitable Gift Annuities: The Complete Resource Manual* has been the go-to resource for all your gift annuity questions for nearly 20 years. From how to establish a program to a discussion of each state's gift annuity regulations, from how to market gift annuities to comprehensive guidance for just about every special situation you can think of, the *CGA Manual* is updated annually to stay current with changes in the law and developments in gift planning. Our next update will be in November.

Available in print and electronic form, no organization that issues gift annuities - or is considering it - should be without PG Calc's *CGA Manual*. Purchase your copy today!

[Learn More>>](#)

When Only a CRAT Will Do

The charitable remainder unitrust (CRUT) is far more popular than the charitable annuity trust (CRAT). Annuity trusts make up only about 15% of all charitable remainder trusts in existence. Nonetheless, there are donor situations where the CRAT can be an attractive option. Although we usually think of the gift annuity when a donor desires fixed payments, here is a list of situations where CRAT beats the gift annuity.

[Learn More>>](#)

Marietta College Gets a Head Start Thanks to *Marketing Services*

Jarrett Stull is the Director of Planned Giving at Marietta College and he credits PG Calc's *Marketing Services* with helping re-launch their planned giving program.

"Our college re-launched its planned giving program in large part thanks to the creative and talented work of PG Calc's *Marketing Services*. Our gift planning website was completely revamped with great ease of navigation, interactive tools for donors, and enhancements that allow us to better monitor traffic and interest from visitors."

Our *Marketing Services* team also helped with Marietta's direct mail campaign. Jarrett continued, "Beyond the website, our print pieces focused on our charitable annuity programs [...] just this summer as a result of the print pieces [we] closed the college's largest charitable gift annuity on record."

Best of all, Jarrett loves working with our hardworking *Marketing Services* team. "In a world where customer service is all too often replaced with 'bottom line' approaches, it is more than refreshing to work with this team who in many ways puts the customer first."



Marietta College

[Learn More about Marietta College>>](#)

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