PG Calc

YOUR PARTNER IN PLANNED GIVING SUCCESS

eRate Newsletter | September 19, 2017

IRS DISCOUNT RATE: October 2.2%

Revocation Language in CGA Agreements - To Include or Not To Include

In preparing a gift annuity agreement in *Planned Giving Manager*, you've likely been presented with the question, "Include revocation language?" The only time you won't see it is with a one-life annuity, where the donor and annuitant are the same person. In any other donor/annuitant combination, the revocation question will be applicable, though the answer may not always be yes.
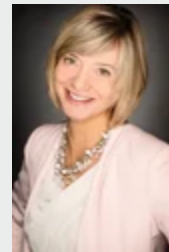
Including revocation language serves two purposes. First, it may enable the donor to avoid making a taxable gift to the annuitant. Second, it preserves flexibility in the event of a change in circumstances, such as the dissolution of a marriage. The decision on whether to include the revocation language is ultimately the donor's, but it is helpful if the charity understands the issues to help inform that decision.

READ THE FULL ARTICLE   PRINT THE FULL ARTICLE

UPCOMING WEBINAR

Understanding the Older Donor

Presented by
Lisa Mayfield

Thursday,
September 28
1:00 - 2.30 pm ET

REGISTER

UPCOMING TRAINING

Planned Giving Manager
October 12-13, Baltimore, MD

GiftWrap
November 2-3, Cambridge, MA

VIEW

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Quick Tip: Sharing Your *PGM Anywhere* Cases with Other *PGM Anywhere* Users

Our *PGM Anywhere* users may want to share a case they are working on with a colleague or with PG Calc support staff. Happily, our recent update of *PGM Anywhere* makes this easy to do.

To save all your inputs for a *PGM Anywhere* case so that you share them:

1. Choose *Save* in the icon bar.
2. Select *File to share (.inpx file)* in the *Save as* menu.
3. Enter a case name and a donor name for your case, then click *Export*.
4. *PGM Anywhere* will place a file of your current inputs with the case name you entered into your Downloads folder.

Anyone with a *PGM Anywhere* account can open the case file you have created. You just need to send it to them.

To open a *PGM Anywhere* case file:

1. Choose *Open* in the icon bar.
2. Select *Import from .inpx file* in the *Type of case.*
3. Browse to the folder where the case file is stored, click the file, and then click *Open*.
4. Edit the fields that now appear, as desired. Also, mark the *Save imported case before opening* box if you wish to save the case in *PGM Anywhere's* database as well as have it update your current inputs.
5. Click *Import*.

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, or call 888-474-2252.

Marketing Corner: Are Your Marketing Efforts Working?

How do you evaluate your marketing program? Well, it depends. There are many things to consider, and because there is no "right" way, it's not as straightforward as you might think.

One characteristic to consider is the age of your program. Is it in its beginning stages, is it a mature

program around for decades, or is it somewhere in between? The age and size of your planned giving program is a material factor when you measure and evaluate the results of your planned giving marketing.

READ MORE

GiftWrap 4.2.11 Released

On August 26th, we released the latest version of *GiftWrap*, which contains a variety of enhancements that further increase the value and utility of PG Calc's administration software. This release focuses on expanded capabilities and enhancements in the following areas:

- Bequest reporting
- Record Death Routine
- Payments

In addition, this release incorporates a variety of bug fixes, enhancing the stability and reliability of the *GiftWrap* application.

These enhancements are further detailed in the *GiftWrap 4.2.11 Release Notes*. Please review these release notes before you use updated *GiftWrap* software.

If you have any questions, contact Client Services at 888-474-2252, or support@pgcalc.com.

PGM 7.4A Released

On September 14, we released *PGM 7.4A*. This update will allow *PGM* clients to continue getting automatic IRS discount rate downloads each month after we apply an upcoming security enhancement to our website. Once we apply this security enhancement, which is scheduled for October 16, clients who have not installed *PGM 7.4A* will need to enter new IRS discount rates manually until they install *PGM 7.4A* or a later release. This update makes no other changes to *PGM*.

If you have not seen your release email or have any questions about installing *PGM 7.4A*, please contact our Client Services team at support@pgcalc.com or 888-474-2252.

PG Calc Zombies Visit NCPP 2017

The National Conference on Philanthropic Planning (NCPP), in Baltimore this year, is right around the corner, and we at PG Calc are very excited to be attending. This year,

we will be occupying a double booth, offering even more opportunities to meet and speak with PG Calc staff members. We have a lot to talk about this year, including new releases of our software products *PGM Anywhere*, *GiftWrap*, *GiftCalcs*, and *Bequest Manager*. Andrew Palmer, Director of Marketing Services, will be there to discuss the latest trends in planned giving marketing, and our consultants will be present in force to answer questions and help you with all of your planned giving challenges.

Also this year, we will have special guests. A full complement of zombies will be at our booth, just waiting for you to take one home. Once armed with a PG Calc zombie, you can enter our [Zombie Photo Contest](#), and become eligible to win a free year of *Planned Giving Manager* (*PGM*) service for your organization.

MCPHS University Has Benefited from a Long-Term Relationship with PG Calc

Massachusetts College of Pharmacy and Health Sciences (MCPHS University) is a New England-based institution of higher education devoted to the preparation of students for successful careers in healthcare. The University offers a wide range of allied health sciences professional programs including nursing, dental hygiene, medical imaging, optometry, pharmacy, physician assistant studies, acupuncture, and rehabilitation sciences. MCPHS University has been a PG Calc consulting client for more than five years, during which time PG Calc provided consulting services in the areas of program evaluation, prospecting, state registration, and marketing.   When MCPHS University needed to ramp up its planned giving marketing program, PG Calc's *Marketing Services* was engaged*,* based on positive experiences with PG Calc over the course of our engagement. Lawrence Townley, Executive Director of Development Operations, University Advancement at MCPHS University, had this to say about PG Calc:

> *"Before engaging PG Calc, planned giving fundraising at MCPHS University was intermittent and incidental. With PG Calc's support, counsel, guidance, and expertise, MCPHS has been able not only to get planned giving on track, but also to establish a way forward. While our program has not achieved its maximum capacity, thanks to PG Calc we are light-years ahead of where we were just four short years ago. The level of personalization, customization, and attention to detail we receive from PG Calc far surpasses any service that we have used before."*

Learn more about the [Massachusetts College of Pharmacy and Health Sciences](#).

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