



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS

eRate Newsletter | September 18, 2018

IRS DISCOUNT RATE: October 3.4%

How to Evaluate the Health of Your Gift Annuity Program

Everyone needs to go to the doctor for a checkup now and again. The same can be said for a gift annuity program. Without the benefit of routine assessments, some programs will encounter problems or fail when an early diagnosis could have saved them.

In this article, Jeff Lydenberg will discuss the three reasons why you need to assess gift annuity risk. In addition, Jeff will describe how to assess gift annuity risk, and how to predict the future performance of your gift annuity program. Finally, Jeff will present risk control strategies for implementation.

[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

UPCOMING WEBINAR

What Your Gift Administrator Can Do For You



Presented by
[Gary Pforzheimer](#)

Thursday,
September 27
1:00 - 2:30 pm ET

[REGISTER](#)

UPCOMING TRAINING

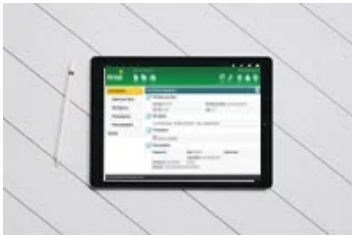
Planned Giving Manager

October 16-17, Las Vegas, NV
November 7-8, Nashville, TN

[VIEW](#)

In This Issue:

- **Quick Tip: Did You Know You Can Add Custom Documents to PGM and PGM Anywhere?**
- **Marketing Corner: Will Your Year-End Giving Communication Be Different This Year?**
- **PG Calc Is Hiring!**
- **GiftWrap Enhanced Security**
- **Upcoming PG Calc Conferences and Training**
- **PG Calc Unicorn Contest Update**
- **KCTS 9 Considers PG Calc Indispensable**



Quick Tip: Did You Know You Can Add Custom Documents to *PGM* and *PGM Anywhere*?

Planned Giving Manager and *PGM Anywhere*, its web-based counterpart, both produce documents that we call narratives. The narratives that come with the software include gift annuity agreements for all 50 states, gift descriptions, acknowledgement letters, and more. But did you know that we can also create custom versions of any of these narratives, or create completely new ones for your use? If there's text in our standard gift annuity agreements you want revised, for example, we can do that. That way, you won't need to edit the agreement in Word every time you produce one.

We have created hundreds of custom narratives for our clients over the years to help them work more efficiently and accurately. Any document that you produce repeatedly, and that includes information from *PGM* / *PGM Anywhere*, is a good candidate to become a custom narrative. If you are interested in exploring further how custom narratives could help you, contact Bill Laskin at blaskin@pgcalc.com or 888-474-2252.



Marketing Corner: Will Your Year-End Giving Communication Be Different This Year?

Fundraisers are entering their year-end mode, and for many organizations the majority of their donations come in the last quarter of the calendar year. What is unknown is how the new tax law will change the way people give this season.

Even though there was a change in the itemized deductions limits, it's unlikely taxpayers adjusted their income tax withholdings. If donors have not been planning, they won't discover the tax consequences of the tax law until next year. That's why recognizing donor uncertainty makes good marketing sense.

[READ MORE](#)



PG Calc Is Hiring!

PG Calc is a 30-year old company based in Cambridge, MA specializing in planned giving that develops, sells, and supports software, offers marketing services and consulting, and provides planned gift administration for charitable organizations nationwide. PG Calc's Client Services is the foundation for our excellent reputation in the important world of charitable gift planning. We are seeking an enthusiastic, service-oriented individual to join our staff of 35 in the Cambridge office.

The Client Services Advisor is part of the Client Services Department, which is responsible for ensuring that PG Calc clients receive outstanding support.

[READ MORE](#)



GiftWrap Enhanced Security

PG Calc has recently made available the *GiftWrap* Enhanced Security Module. This module includes a series of features which enhance the overall security of the *GiftWrap* application and the data it stores.

In addition to the variety of *GiftWrap* features that ensure the integrity and safety of client data, this module provides functions that may be required in order for *GiftWrap* to conform to third party and internal IT requirements. These functions include the following:

- Hosting Options
- IP Filtering
- Enhanced Data Masking
- Two-Factor Authentication
- Single Sign On

Note that *GiftWrap* Enhanced Security module features are separately priced, and can be purchased in bundles, or on a stand-alone basis.

[READ MORE](#)



Upcoming PG Calc Conferences and Training

Fall has begun, and with it a new season of conferences and training sessions. We will be in Portland, ME, Portland, OR, and Seattle this September and then Las Vegas, St. Paul, and Philadelphia in October for [conferences](#). Fall [training sessions](#) for *Planned Giving Manager* in Las Vegas ([CGP Conference](#)) and Nashville are still open. We look forward to seeing you there — come find us and get a unicorn!



PG Calc Unicorn Contest Update

Always be yourself, unless you can be a PG Calc Unicorn. Then, always be a PG Calc Unicorn!

PG Calc's unicorns have been dancing across the country at conferences and trainings all summer. While the contest was initially supposed to end on Labor Day, we have decided to keep the magic going so those attending fall events will be able to participate. With a new deadline of October 31st, there is still time to be creative and send us the reason you think PG Calc is like a unicorn. Look for us at trainings and conferences near you to get one of your own!

Please come see us at a conference, or sign up for a training session. See the full [PG Calc conference schedule](#). You can also find our [training schedule](#) on our

website.

READ CONTEST RULES



KCTS 9 Considers PG Calc Indispensable

KCTS 9 is a non-commercial educational television station serving as the primary member station of the Public Broadcasting Service for the Seattle-Tacoma television market. PG Calc continues a long-term consulting relationship with KCTS 9, advising them on all matters planned giving, including prospect identification, marketing, and technical aspects, to maximize their planned giving efforts and results.

Sherry Larsen-Holmes, Planned Giving Officer for KCTS 9, had this to say about PG Calc Consulting services:

“PG Calc is an indispensable resource for KCTS 9, a PBS member station in Seattle. Over the years, we’ve worked with various PG Calc staff and put their knowledge to the test with CGAs, CRTs, and real estate gifts among others. Not only do they have expertise in the technical details of executing gifts that best meet a donor’s situation, but they have insight into the more nuanced aspects of cultivating and stewarding donors as well. Knowing that the PG Calc team stands beside us lets us explore complex gifts with confidence. PG Calc gives KCTS 9 an entire team of planned giving experts who provide a customized approach to working with gift planning staff and who boost our ability to market, administer and close gifts.”

Learn more about [KCTS 9 Public Television](#).

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



Sales: info@pgcalc.com

888-497-4970

Support: support@pgcalc.com

888-474-2252