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eRate Newsletter | September 18, 2019

IRS DISCOUNT RATE: October 1.8%

Year-End Marketing Ideas

What are you planning for your year-end planned giving marketing campaign? It's not too early to be solving this problem. While mailing to your donors is important year-round, the fall, before Thanksgiving, can be a particularly opportune time to communicate with donors. This is especially true for planned gifts, as many of these gifts are completed late in the year.

In this month's featured article, Andrew Palmer, PG Calc's Director of *Marketing Services*, presents five ideas for year-end marketing campaigns that both reflect and leverage the current planned giving environment.

[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

UPCOMING WEBINAR

Surveying Planned Giving Prospects



Presented by
[Andrew Palmer](#)

Thursday,
September 26
1:00 - 2:30 pm ET

[REGISTER](#)

UPCOMING TRAINING

Planned Giving Manager

October 1-2, New Orleans, LA
November 13-14, San Francisco, CA

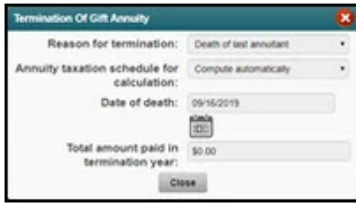
GiftWrap

October 16-17, Cambridge, MA

[VIEW](#)

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Quick Tip: *PGM Anywhere* Performs All the Gift Annuity Termination Calculations You May Need

The Deduction for Gift Annuity Termination tool in *Planned Giving Manager* has been a workhorse for many years, but it has its limitations. In contrast, the Termination of Gift Annuity feature in *PGM Anywhere* makes it easy to make all the gift annuity termination computations you may need.

Whether you want to compute the deduction available when the last annuitant dies prior to receiving all tax-free amounts or when an annuitant reassigns her annuity interest to your charity, the Termination of Gift Annuity feature can give you the answer. It can also compute the amount your charity should pay an annuitant who wishes to reassign her annuity interest to the charity in exchange for cash, as well as the taxation of the cash payment. In all these situations, the feature also computes how the payments made in the year of termination will be taxed.

To produce gift annuity termination calculations in *PGM Anywhere*:

1. Enter the details of the gift annuity, such as the date of gift. Be sure to enter the annuitant's birth date, not her age.
2. Open Presentations and choose Termination of Gift Annuity in the Basic Charts section.
3. Answer the follow-up questions that appear for the Termination of Gift Annuity presentation.
4. Choose Results.

If you need assistance or have any questions, please contact PG Calc Client Services at 888-474-2252, or email at support@pgcalc.com.

PG Calc Blog

The latest on planned giving from PG Calc.

Latest PG Calc Blog Post

Attracting Gifts From Donor Advised Funds - What's Your Strategy

The popularity of donor advised funds (DAFs) has resulted in a national movement in charitable giving. In 2017, assets in these funds reached a record \$110 billion according to a report from the National Philanthropic Trust. This explosive growth presents a tremendous opportunity for public charities to benefit from this pool of assets.



READ MORE



Webinar Recordings Make Valuable Content Available to You and Your Colleagues

Have you attended one of PG Calc's monthly webinars and wished you could share it with fundraising colleagues, board members, or others who didn't attend with you? Has PG Calc offered a webinar that you couldn't attend live, but would like to watch later?

Well, you're in luck! We record all our webinars and make them available for purchase. Recordings are available for purchase both in advance of and following the corresponding live session, and orders are filled within 2-3 weeks of the live session.

Each roughly 90-minute recording offers audio and video of the entire presentation, including the Q&A portion, as well as PDFs of the webinar paper and slides. You can watch the webinar recording as many times as you like.

1. Go to the [webinars page](#) on the PG Calc website.
2. Click the webinar that you want to buy a recording of. If you don't see the webinar listed, click the **From/To Date** field, then click **This Year** or **Last Year** on the right. If you still can't find it, contact PG Calc at 888-474-2252 or email support@pgcalc.com.
3. Click the **Buy Recording** button, then complete and submit the recording purchase form.

If you would like to attend a future PG Calc webinar, you can [register here](#). See a [full listing](#) of PG Calc's webinars for 2019.



Latest Update to PG Calc's GiftWrap Software

PG Calc's *GiftWrap* is the industry leading planned gift administration platform. With *GiftWrap*, you can provide the highest level of donor stewardship, while ensuring the financial stability of your planned giving program, all the while keeping your management and board abreast of program performance via a comprehensive suite of reports.

Of late, we have given considerable attention to enhancing *GiftWrap* security. *GiftWrap* incorporates in its basic architecture design state-of-the-art security features, including encryption of all Web requests using Transport Layer Security (TLS), validation of all user-entered data to

mitigate against malicious attacks, and parameterized stored procedures and input validation, protecting against SQL script injection.

In today's operating environment, more security is always better. As such, we continue to enhance *GiftWrap* system security. Most recently, we have added two new optional security features, Single Sign-On and 2-Factor Authentication, each of which enables *GiftWrap* to better conform to local security policy and procedures.

In the most recent release of the *GiftWrap* system, version 4.2.17, we have incorporated a set of highly requested enhancements, including the following:

- Expanded encryption of *GiftWrap* database fields, further enhancing *GiftWrap* data integrity and security.
- Updating of password encryption routine and functionality.
- Enhancements to the audit function, which tracks user actions and database changes.
- Even more comprehensive reporting functionality.

Learn more about [PG Calc's GiftWrap](#).

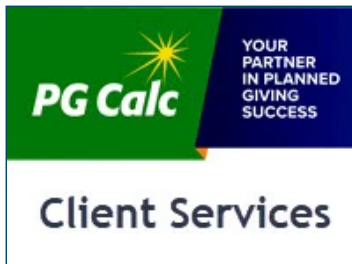
If you have any questions, please contact PG Calc Client Services at 888-474-2252, or email at support@pgcalc.com.



New *PGM Anywhere* Offers Improved Designer Proposals

This evening, PG Calc will release the latest version of *PGM Anywhere*, our online planned gift illustration software that is optimized for use on tablet, laptop, and desktop computers. This release includes improved print quality of *Designer Proposals*, *PGM Anywhere*'s brochure-style personalized proposals, revisions to reflect recent changes in the regulation of gift annuities in Alabama and Montana, and several bug fixes.

To learn more about *Designer Proposals*, [click here](#), email info@pgcalc.com, or call 888-497-4970.



We're Hiring!

PG Calc is currently seeking an enthusiastic, service-oriented individual for the position of Client Services Advisor in our Cambridge, MA office. The Client Services Advisor is a member of PG Calc's Client Services Department, which is responsible for ensuring that PG Calc clients receive outstanding support.

The successful candidate will have the opportunity to contribute to PG Calc's industry-leading reputation in the world of charitable gift planning.

To learn more, email support@pgcalc.com, or call 888-474-2252.



The Oregon Humane Society Is Thrilled to Be Part of the PG Calc Family

Since 1868, the Oregon Humane Society (OHS) has been on the forefront of defending and caring for animals. As the fourth oldest humane society in the United States, the Oregon Humane Society's tradition of compassion and dedication continues today. Over the last quarter century, bequests have helped to transform the work of the Oregon Humane Society.

In 2018, OHS conducted a search for an online tool that would allow donors to prepare their own Charitable Gift Annuity illustrations. OHS reviewed the offerings of various vendors and selected PG Calc, initially focusing on PG Calc's *GiftCalcs* online gift calculation tool, and then ultimately signing up for PG Calc's *Marketing Services* suite of marketing tools, content, and consulting. In addition, OHS purchased *Planned Giving Manager*, PG Calc's industry standard gift calculation software. As a PG Calc customer, OHS has been particularly pleased with the quality of PG Calc's client services.

Kathryn Karr, Planned Giving Program Manager for OHS, had this to say about PG Calc:

"As happy as we are with PG Calc's products and services, the robust customer support provided by PG Calc has been a real bonus. From timely web site updates, to consultation and advice on complicated gift proposals, to ideas for actionable and effective marketing campaigns, the PG Calc support team has consistently exceeded our expectations. We've been thrilled to be part of the PG Calc family."

Learn more about [the Oregon Humane Society](#).

Learn more about PG Calc's [Marketing Services](#).



Sales: info@pgcalc.com
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