



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS

eRate Newsletter | August 19, 2019

IRS DISCOUNT RATE: September 2.2%

Donor Decisions Affected by Itemizing

Since the Tax Cuts and Jobs Act of 2017 was signed into law, much has been written about its effect on the number of U.S. taxpayers who will itemize their deductions. The new law, which became effective on January 1, 2018, made several changes that have greatly reduced the number of taxpayers who itemize.

In this month's featured article, Bill Laskin, PG Calc's VP of Product Management, discusses the impact of these changes on donors who expect to itemize, and those who don't, and how fundraisers can best help donors considering a gift annuity.

[READ THE FULL ARTICLE](#)

[PRINT THE FULL ARTICLE](#)

UPCOMING WEBINAR

Tax Info Every Gift Planner Should Know



Presented by

[Jeffrey Frye](#)

Thursday,
August 29

1:00 - 2:30 pm ET

[REGISTER](#)

UPCOMING TRAINING

Planned Giving Manager

September 11-12, Washington, DC

October 1-2, New Orleans, LA

November 13-14, San Francisco, CA

GiftWrap

October 16-17, Cambridge, MA

[VIEW](#)

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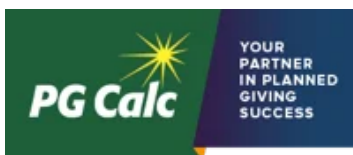
Quick Tip: How to Save Your *PGM Anywhere* Work Wherever You Want

As in the desktop version of *Planned Giving Manager (PGM 7.5B)*, we highly recommend you save your calculation inputs in web-based *PGM Anywhere* before exporting to Microsoft Word or PDF or sending your proposal to a donor. By saving your *PGM Anywhere* inputs, you can easily pick up where you left off without having to re-enter the details of a gift.

In *PGM Anywhere*, there are two ways to save your work.

1. **Save as: Case in database.** By saving your inputs as a case in the *PGM Anywhere* database, you and other users at your organization (with permission to access your cases) can easily retrieve it using the Open function. This is the default Save option in *PGM Anywhere*. Be sure to enter a Case name and Donor name that will help you find your illustration later. We recommend using a naming convention so that cases are named in a uniform fashion across your team (e.g., “Smith, Susan CGA 01-01-2019”).
2. **Save as: File to share (.inpx file).** This option allows you to save your inputs in a file on your computer or network drive. By sharing the file, you can share your inputs with any other *PGM Anywhere* user. Note: When using this option, most web browsers default to saving the file to your computer’s Downloads folder. If you prefer to save files directly to another location, you can [edit your browser settings](#).

Need help saving your illustrations in *PGM Anywhere*? Contact Client Services at 888-474-2252 or support@pgcalc.com.



Consulting: Nothing Too Big or Too Small

PG Calc’s *Consulting Services* offers a range of options to suit your needs for assistance in operating your gift planning program. Engagements can be as a fixed-fee project, on an hourly basis, or as a monthly retainer.

Are you concerned about the profitability, processes, and operation of your gift annuity program? PG Calc can conduct a gift annuity audit, for a fixed fee, both to assess the financial health of your annuities and also to offer suggestions on strengthening your program. Perhaps you have a gift that requires expert input on how to create a complex illustration. You can engage a consultant on an hourly basis to develop a winning proposal. If you don’t have a full-time planned giving specialist on your team, you can engage a PG Calc consultant on a retainer basis in lieu of hiring a staff member.

You'll have access to outstanding expert assistance on prospect management, program infrastructure, successful marketing, and complex gift design when you need it. Whatever your need for skilled planned giving counsel, PG Calc's *Consulting Services* team stands ready to meet it and your budget.

The image shows a spreadsheet with columns for 'Year', '2000 CM', '2012 CM', '2012 CM - 2000 CM', '2012 CM - 2000 CM %', '2012 CM - 2000 CM %', and '2012 CM - 2000 CM %'. The rows represent different years from 2000 to 2012, showing the projected remainder amounts and the percentage difference between the 2000 CM and 2012 CM values.

Still Waiting . . . for the New Mortality Table

Yup, we're still waiting for the IRS to announce the new mortality table that will replace 2000CM for computing charitable deductions for split interest gifts, such as gift annuities and charitable remainder trusts. We continue to watch closely our sources for this information and remain poised to jump into action as soon as the new table is announced. We presume that will be before the end of the year. We can't be any more precise than that.

Hello
my name is

PLANNED GIFT PROSPECT

BatchCalcs Will Make Your Gift Annuity Mailing More Compelling

Many of our clients send a gift annuity mailing in mid to late fall to appeal to their donors and prospects when they are planning their year-end giving. If you are planning to send a gift annuity mailing this fall, consider using PG Calc's *BatchCalcs* service to personalize the benefits you share with each recipient, such as their annuity rate and charitable deduction. All we need from you is a spreadsheet of birth dates or ages and a few days to do the work. We can even create a file of Summary of Benefits charts or letters with numbers, names, and addresses merged in, if you wish.

A more personal message is a more compelling message. *BatchCalcs* will help your gift annuity mailing generate more well-qualified prospects and more gifts.

Call Dave Wolfe at 888-497-4970 for more information.

READ MORE



Fall 2019 Planned Giving Conferences

Fall conference season is fast approaching and we at PG Calc are busy making sure everything will be ready. We are looking forward to seeing many of you in cities across the country in the coming months. If you'll be at one of the conferences listed below, please stop by! We would love to chat, and we'll have this year's follow up to zombies and unicorns—dino poppers!

8/21 – Colorado Planned Giving Roundtable – Englewood, CO

9/24 – Northwest Planned Giving Roundtable's 31st Annual Conference – Portland, OR

9/25 – Maine Planned Giving Council's Annual Conference – Portland, ME

9/26 – Washington Planned Giving Council's 2019 Planned Giving Day – Seattle, WA

10/2-10/4 – CGP National Conference – New Orleans, LA

10/22-10/24 – Minnesota Planned Giving Council's 43rd Annual Conference – St. Paul, MN

10/23-10/25 – AHP Annual Conference – Washington, DC

10/30 – Planned Giving Council of Greater Philadelphia's Planned Giving Conference – Philadelphia, PA

[PG Calc Conference Schedule](#)



Mystic Aquarium Closes First CGA with Help from PG Calc

Mystic Aquarium, located in Mystic, Connecticut, is ranked by USA Today as one of the five best aquariums in the US, and one of New England's top tourist destinations. In addition, the Mystic Aquarium has been nationally and internationally recognized for its outstanding work in both marine conservation and research.

Mystic Aquarium has had the beginnings of a Planned Giving Program in place, including the Kelvin Smith Legacy Society, for some time. Most recently, under the leadership of President Steve Coan, Ph.D., the Aquarium embarked on an initiative to raise \$5m in charitable gift annuities to help ensure the future financial strength of the Aquarium. The Aquarium partnered with PG Calc on this Preservation Fund for the Future initiative, and with the help of PG Calc, the Aquarium was able to close its first charitable gift annuity. PG Calc is now helping the

Aquarium embark on an effort to reach a wider group of friends of Mystic Aquarium.

Myles Weisenberg, Mystic Aquarium planned giving consultant and former VP, Development at Brandeis University, had this to say about PG Calc:

"With PG Calc's help, we were able to close our first CGA ever. From the gift illustrations and gift annuity contracts generated with PG Calc's Planned Giving Manager software, to the expert support from PG Calc's highly regarded Client Services organization, PG Calc has helped ensure that the Aquarium is off to an excellent start in our Preservation Fund for the Future campaign. Based on this experience, we are very optimistic about our planned giving program, and we are very excited about continuing to partner with PG Calc."

Learn more about [Mystic Aquarium](#).

Learn more about PG Calc's [Planned Giving Manager](#).



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