

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS



The Key to Repeat Gifts: Great Gift Administration and Stewardship


Date: August 29, 2024
Time: 1:00 – 2:00 Eastern
Presenter: Gary Pforzheimer
 President, PG Calc

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Our Agenda Today

- Repeat Gifts are the Goal!
- Gift Planning Cycle
- Who are the Dancers?
- Some Common Mistakes



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Repeat Gifts

% of Gift Annuities in Last Year from Donors Who Previously Contributed a Gift Annuity to Your Charity

	2021	2017	2013
0%	14%	21%	21%
1-25%	6%	11%	9%
26-50%	35%	24%	31%
51-75%	21%	22%	22%
76-100%	24%	22%	17%
Mean	51%	47%	44%
Median	50%	50%	49%

Source: American Council on Gift Annuities, 2021 Survey of Charitable Gift Annuities

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The Gift Planning Cycle

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The Repeat Gift Dance Squad

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Role of Gift Planner

- Choreographer
- Marketing
- Ticket Agent
- Stage Manager
- Usher
- Facilities

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Role of Treasurer/CFO

- Policies
- Deposits
- Segregated Accounts
- Valuations
- Compliance
- Communicate, *regularly*

Treasurer/
CFO

Gift Planner

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Role of Investment Manager/Custodian/Trustee

- Policies
- Investment Objectives
- Compliance
- Deposits
- Disbursements

Gift Planner

Custodian/
Investment Mgr/
Trustee

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Role of Administrator

- Policies
- Compliance
- Valuations
- Database & Recordkeeping
- \$ Distributions
- Tax Forms
- Customer Service

Gift Planner

Administrator

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Role of Donor

- Goals
- Policies
- Information
- On-going communication

A Venn diagram consisting of two overlapping circles. The left circle is yellow and labeled "Donor". The right circle is a textured gold color and labeled "Gift Planner". The overlapping area in the center is a darker shade of gold.

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Common Mistakes Establishing a CGA (Before)

- Using the wrong amount for the gift value
- Annuity established and payment frequency isn't what annuitant wanted

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Common Mistakes Administering a CGA (During)

- Payments sent to wrong address/bank account
- Failure to start a Deferred Gift Annuity or a Flexible Deferred Gift Annuity
- Mailed the wrong tax information on a 1099-R

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Common Mistakes Upon Termination (After)

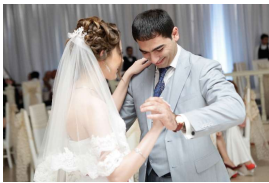
- A. Not tracking market values of restricted gift annuities
- B. Didn't make the right final payment
- C. Not computing the Unrecovered Investment in Contract for the estate

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Plan, Practice, Perfect




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Still Have a Question?



To ask a question click the Q&A button at the bottom

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Still Have a Question?

Contact: Gary Pforzheimer
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