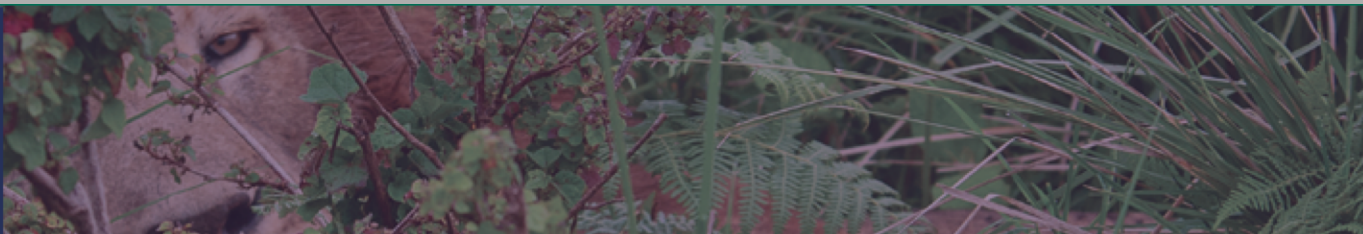




YOUR  
PARTNER  
IN PLANNED  
GIVING  
SUCCESS



## What Your Administrator Can Do For You



Date: September 27, 2018

Time: 1:00 – 2:30 Eastern

Presenter: Gary Pforzheimer  
President  
PG Calc



## Agenda

- I. Who are all the players anyway?
- II. What are the main tasks of an administrator?
- III. What are the characteristics of an excellent administrator?
- IV. It takes two to tango
- V. Pitfalls and horror stories



## 1. Who are all the players anyway?

- Custodian
- Trustee



## 1. Who are all the players anyway?

- Investment manager
- Administrator



## 1. Who are all the players anyway?

- Tax preparer
- State regulation annual filer



## 2. What are the main tasks of an administrator?

- Maintain an accurate database
- Process new gifts, terminations, and data changes



## 2. What are the main tasks of an administrator?

- Send payments out
- Send tax forms out
- Complete compliance reports



### 3. What are the characteristics of an excellent administrator?

- Be an extension of your brand
- Perform all tasks accurately and on time
- Communicate excellently





### 3. What are the characteristics of an excellent administrator?

- Know the compliance responsibilities
- Use proven and constantly improving processes and checklists
- Verify and clarify



### 3. What are the characteristics of an excellent administrator?

- Have appropriate security concerns and considerations for your data
- Lead the process



## 4. It takes two to tango

- Provide accurate information on time
- Be responsive to requests



## 4. It takes two to tango

- Years in operation
- Provide backup personnel for absences
- Be an educated consumer of these services
- Pay your bills on time



## 5. Pitfalls and horror stories

- Return from the dead



## 5. Pitfalls and horror stories

- That's just wrong!



## 5. Pitfalls and horror stories

- Afraid to call the donor's family





## 5. Pitfalls and horror stories

- Oops, I forgot about this gift until now







## 5. Pitfalls and horror stories

- I didn't think I needed to tell you that



## Questions?

- To ask a question:  
Send a message via the chat box.





## Still Have a Question?

Contact: Gary Pforzheimer

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