


PG Calc 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

PG Calc | Your Partner In Planned Giving Success

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


© 2018 PG Calc What Your Administrator Can Do For You 7

PG Calc | Your Partner In Planned Giving Success

1. Who are all the players anyway?

- Custodian
- Trustee


© 2018 PG Calc What Your Administrator Can Do For You 8

PG Calc | Your Partner In Planned Giving Success 

1. Who are all the players anyway?

- Investment manager
- Administrator


© 2018 PG Calc What Your Administrator Can Do For You 9

PG Calc | Your Partner In Planned Giving Success 

1. Who are all the players anyway?

- Tax preparer
- State regulation annual filer


© 2018 PG Calc What Your Administrator Can Do For You 10

PG Calc | Your Partner In Planned Giving Success 

2. What are the main tasks of an administrator?

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


© 2018 PG Calc What Your Administrator Can Do For You 11

PG Calc | Your Partner In Planned Giving Success 

2. What are the main tasks of an administrator?

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


© 2018 PG Calc What Your Administrator Can Do For You 12

PG Calc | Your Partner In Planned Giving Success 

3. What are the characteristics of an excellent administrator?

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


© 2018 PG Calc What Your Administrator Can Do For You 13

PG Calc | Your Partner In Planned Giving Success 

3. What are the characteristics of an excellent administrator?

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


© 2018 PG Calc What Your Administrator Can Do For You 14

PG Calc | Your Partner In Planned Giving Success 

3. What are the characteristics of an excellent administrator?

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


© 2018 PG Calc What Your Administrator Can Do For You 15

PG Calc | Your Partner In Planned Giving Success 

4. It takes two to tango

- Provide accurate information on time
- Be responsive to requests

© 2018 PG Calc What Your Administrator Can Do For You 16

PG Calc | Your Partner In Planned Giving Success 

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

© 2018 PG Calc What Your Administrator Can Do For You 17

PG Calc | Your Partner In Planned Giving Success

5. Pitfalls and horror stories

- Return from the dead

© 2018 PG Calc What Your Administrator Can Do For You 18

PG Calc | Your Partner In Planned Giving Success

5. Pitfalls and horror stories


- That's just wrong!

© 2018 PG Calc What Your Administrator Can Do For You 19

PG Calc | Your Partner In Planned Giving Success

5. Pitfalls and horror stories

- Afraid to call the donor's family




© 2018 PG Calc What Your Administrator Can Do For You 20

PG Calc | Your Partner In Planned Giving Success

5. Pitfalls and horror stories

- Oops, I forgot about this gift until now



© 2018 PG Calc | What Your Administrator Can Do For You | 21

PG Calc | Your Partner In Planned Giving Success

5. Pitfalls and horror stories


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

© 2018 PG Calc | What Your Administrator Can Do For You | 22

PG Calc | Your Partner In Planned Giving Success

Questions?

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



© 2018 PG Calc | What Your Administrator Can Do For You | 23



Still Have a Question?

Contact: Gary Pforzheimer

Email: gary@pgcalc.com

Phone: 888-497-4970
