

## 2/1/2024 PG Calc Client Outreach Suggested Phone Script

*Draft 1/31/2024*

Hi, this is \_\_\_\_\_ from PG Calc. I have some important news about PG Calc, and I wanted to let you know before the public announcement next week. On February 1<sup>st</sup> PG Calc was acquired by Foundation Source, the nation's largest provider of foundation management services for private philanthropists and their foundations. PG Calc will operate as the planned giving division of Foundation Source with no changes to our team, software, and services. The two companies are being combined to bring together the best technology, service, and philanthropic expertise to serve charities and nonprofits, donors, and their advisors and to make giving easier and more impactful.

[Refer to Q&A to answer any specific questions]

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**[Gift Admin]** If you have any questions, please don't hesitate to contact me or our department director, Julia Boerth, at 888-497-4990.

**[Marketing Services]** If you have any questions, please don't hesitate to contact me or Andrew Palmer at 617-497-4978.

**[Consulting]** If you have any questions, please don't hesitate to contact me or Jeff Lydenberg at 617-497-4997.

**[Everyone else]** If you have any questions, please don't hesitate to contact me at 888-497-4970.

Keep an eye out for the public announcement next week [the week of February 5<sup>th</sup>].

Have a great day.

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[Note: if you get questions you cannot answer and/or requests to talk directly to Gary please respond:]

- **[Questions you can't answer:]** That's a great question. I'll have [Director's name] get in touch with you with more information since I'm not able to answer that right now.
- **[Client to talk to Gary:]** As you can imagine, Gary is spending a lot of time talking to clients right now, and that is important to him. I will let him know that you'd like to talk to him directly. It might be a few days before he is able to return your call, but I know it is important to him to speak with you.

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### **Voicemail message version:**

Hi, this is \_\_\_\_\_ from PG Calc. I was hoping to reach you in person to give you advanced notice about some important news about PG Calc before it's public. On February 1<sup>st</sup> PG Calc was acquired by a company called Foundation Source, which is the nation's largest provider of foundation management services. PG Calc will operate as the planned giving division of Foundation Source with no changes to our team, software, and services. The two companies are being combined to bring together the best technology, service, and philanthropic expertise to serve charities and nonprofits, donors, and their advisors. You'll see more in an announcement we'll be sending next week, but I wanted to give you a heads-up. I hope to catch up with you soon.