



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS

Bequest Manager

Ensure continuity and increase legacy giving
with *Bequest Manager*.

Bequest Manager

PG Calc's *Bequest Manager* is the only product available that is built specifically for managing legacy gifts.

Bequest Manager will help ensure your legacy program reaches its potential.

- Get control of your legacy giving program.
- Get through probate successfully.
- Facilitate ongoing relationships with donors.

PG Calc's *Bequest Manager* software provides you with the tools you need to organize your legacy society, letting you track bequest and bequest-like gifts from intention to realized gift.

Get Organized

Most planned giving programs start by accepting bequest gifts, typically an informal and ad-hoc process. As a consequence, results tend to be hit or miss. With *Bequest Manager*, the management of legacy gifts becomes more predictable, better organized, and more productive.

Offering the right combination of technology and process, *Bequest Manager* will enhance your organization's ability to quantify legacy gift opportunities, steward donors, and receive the full intended gift amount at the completion of probate.

Stay In Touch

A legacy gift represents a long-term relationship between your organization and the donor. While it is likely that your organization will remain in the donor's will once that philanthropic intent is expressed, there is no guarantee.

You can take the uncertainty out of this equation by practicing well-organized and purposeful stewardship of your bequest donors. That's where *Bequest Manager* comes in. Unlike general purpose databases or a collection of spreadsheets, *Bequest Manager* provides you with the tools you need to maintain ongoing communication with donors, family members, and advisors.

Manage the Process

The road to a realized bequest is a long one, and there are many potential barriers along the way. This is especially the case during the probate process. Have you gotten a statement of assets from the estate administrator? Did the payment of local and state taxes diminish the amount of expected bequest distributions? Have all filings taken place on time and as required? Your objective is to ensure that your organization receives all that it is entitled to, as quickly as possible. With *Bequest Manager*, you can keep track of the myriad issues that need your attention during probate and ensure that you maintain ongoing communication with the donor's estate.

Bequest Manager

Bequest Manager helps you administer your legacy giving program by providing advanced reporting to determine its overall health.

Bequest Manager Features

Bequest Manager is the only purpose-built legacy giving administration program available. With *Bequest Manager*, you have a centralized database from which to manage your legacy gifts, from first notification of gift intention to the final distribution of a realized gift. *Bequest Manager* is available as stand-alone software or as an optional module in the *GiftWrap* planned gift administration system. Because *Bequest Manager* is a hosted web application, you don't need to worry about installation or ongoing maintenance, and you can be confident that your sensitive program data is secure.

Data Management

- Captures and maintains full detail on all bequest intentions and realized gifts.
- Records multiple transfer types – will, revocable living trust, beneficiary designation.
- Supports diverse asset types – cash, stock, real estate, personal property, trusts, investment accounts, insurance policies, and more.
- Provides comprehensive tracking of gift status – intention, notification, in process, in probate, in litigation, partial distribution, full distribution.
- Includes a range of date identifiers – intention date, estate filing date, estimated and actual close dates.
- Provides ability to:
 - Record distribution amounts received and expected.
 - Assign probability to each bequest intention.
 - Record calls, letters, emails, and changes to bequest status.

Document Management

- Maintains any form of electronic document, including wills, estate inventories, trust documents, etc.
- Associates documents with the correct organization, person, and gift records.

Enhanced Security

- Includes multiple hosting options, IP filtering, enhanced data masking, 2-factor authentication, and single sign-on access management.
- Supports Secure Key Management, based on Amazon KMS and CloudHSM, providing facilities for remote encryption key management.

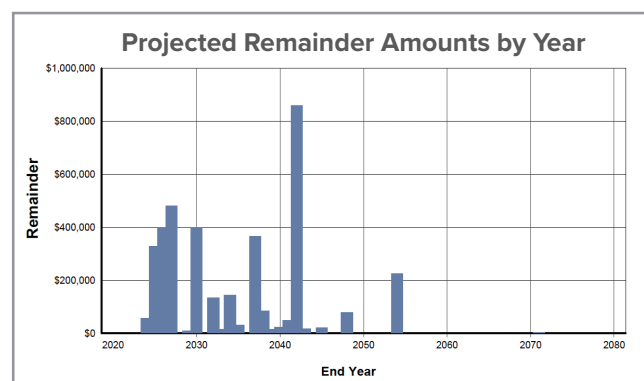
Data Reporting and Analysis

Provides extensive and actionable reporting, including:

- Comprehensive gift summaries by designation.
- Projected remainder of each bequest with the option to calculate present value.
- Graph of overall projected return on bequest intentions.
- Pipeline reporting of anticipated income from realized bequests.
- Comprehensive estate summaries.
- Legacy society membership.
- Workflow and task status.
- Statistics for overall legacy program.

Stewardship Management

- Provides customized letters from templates for donors, relatives, attorneys, executors, etc.
- Tracks current distributions and projects future distributions.
- Enables workflows for a variety of tasks, including tracking gifts through probate, distribution, and more.



Praise for PG Calc's

Bequest Manager

“ I love *Bequest Manager*! It is wonderful having all the information I need on bequests in one place, being able to see attorney contact information, gifts expected or already received and bequest pipeline reports. I also love the storage feature that allows you to put a will or trust document into an individual record. I am so much better organized now. The staff at PG Calc are helpful and easy to get in touch with should you have a question.”

— **Scotty Abney**
Executive Assistant, Berea College

“ *Bequest Manager* gave us much more insight into the health of our bequest program. Organizing our files in a central online database with meaningful reporting allowed us to quickly extrapolate data whenever we needed it. After entering our records into *Bequest Manager*, we discovered the true magnitude of our bequest program – including some gifts whose value we weren't previously aware of!”

— **Melody Sakhai**
Trusts & Estates Attorney, Hadassah

“ We use the *Bequest Manager* module to track deferred gifts, and designations to drill down by unit, initiative, and endowment status. Since our system database, Advance, is unable to report in these ways for deferred gifts, we depend highly on the reports available in the *Bequest Manager* module. We are also able to track gifts from inception to realization. At this time of year (nearing our FYE), we are able to see which estate gifts might be realized by FYE utilizing the Bequest Pipeline report.”

— **Julie Price-Trickey**
Gift Planning Associate, University of Florida Foundation