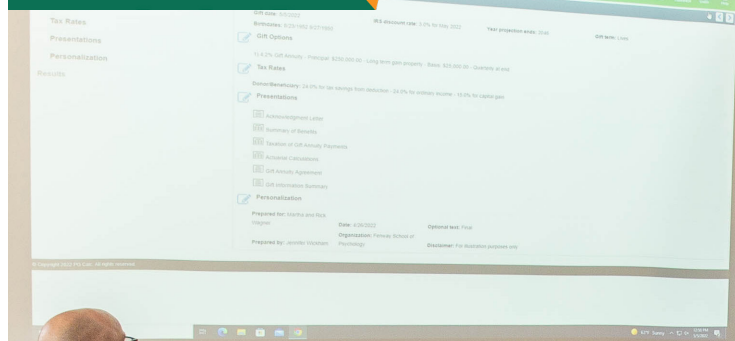




YOUR  
PARTNER  
IN PLANNED  
GIVING  
SUCCESS



# Education

The more you know about planned giving,  
the better you will serve your donors.

# Education

Knowing the right questions to ask is as important as finding the right answers.

## PG Calc's training will help you:

- Increase your expertise.
- Build confidence with prospects.
- Engage and inspire your donors.
- Strengthen your program.

Planned giving is full of complexities. Newcomers often find it an overwhelming discipline, and even experienced gift planners are challenged to stay current with new developments in the field. In fact, seasoned planned giving professionals call on us almost as often as new gift planners, seeking our expertise in everything from gift design and tax law changes to compliance reporting and gift administration. Gift planning may be a major part of your job or an occasional extra responsibility, but what matters is that you have the know-how when it counts.

The educational opportunities PG Calc offers have two objectives. First, we want you to be the most informed, skillful, and confident gift planner you can be. This is true whether you're a development officer who wants to identify planned gift prospects, a planned giving officer who wants to master the field, or someone whose educational needs are somewhere in between. Second, we know our software can contribute significantly to your planned giving program, and we want you to maximize its benefit.

## Training

- Improve your ability to explain gift concepts to donors.
- Broaden your gift planning options to better meet your donors' objectives.
- Learn what questions to ask and what information is necessary to meet tax and compliance requirements.
- Enhance your ability to report to management and to project expectancies.
- Gain productivity and save time using more of the software's functionality.

PG Calc offers a comprehensive suite of training opportunities for *PGM Anywhere* and *GiftWrap*. Choose a session that is convenient for you, or select custom training that can be designed specifically for your organization's needs.

**Group Training Seminars** – These software training sessions are designed to help you gain greater understanding about gift planning and gift administration techniques. Learn how the robust features of our software can boost your productivity and help you master best practices.

You'll learn essentials, such as how to create powerful and motivating gift illustrations, as well as how to forecast the value of gifts you've already received. Currently, the majority of PG Calc's training is conducted online, as opposed to in-person.



# Education

Our suite of custom trainings and education materials helps perfect your planned giving knowledge.

**Distance Learning** – Distance learning is the main way PG Calc currently holds individual and group trainings, and this continues to be a highly effective and convenient form of learning for our clients. Today's technology allows us to share screens, illustrate concepts, and respond to questions as if we were in the same room. Distance learning is typically organized as a sequence of one or more 90-180 minute sessions. With a stable internet connection, anyone can participate in our training sessions.

**Custom Training** – Minimize the time you and your team spend away from working with donors by having a PG Calc instructor personally teach your organization the ins and outs of our software. You can use the standard curriculum, or PG Calc can create a customized session tailored to your team's needs and program's policies. Our custom trainings can either be set up as an online session, or our instructors can teach in-person at your organization. Suitable for small or large groups, this method fosters good communication among team members.

**Orientations** – Complimentary one-hour online orientations for PG Calc's software give new staff members an overview of the software's functionality and capabilities or provide a refresher for more experienced clients.

NOTE: We continue to monitor the pandemic and may pause in-person trainings as necessary. For in-person classes, we are planning to base our COVID policies on those of the associated conference or prevailing state or local guidelines.

## Webinars

- Benefit from the experience and expertise of accomplished presenters.
- Achieve staff development goals with enjoyable and pertinent monthly webinars.

PG Calc's interactive webinars offer a convenient and efficient approach to enhancing your team's planned giving knowledge. Our monthly webinars address a wide array of gift planning topics, from tax basics and state gift annuity regulations to current research, marketing, and more. Presenters include senior PG Calc staff and expert practitioners. Sessions range from beginner to expert and include a detailed paper and a PDF of the presenter's slides. If you register for a webinar but are unable to watch it live, you can watch a replay for a nearly identical experience.

## CGA Manual

**Charitable Gift Annuities: The Complete Resource Manual** is the authoritative reference on gift annuities and continues the tradition of excellence established by Frank Minton, the original principal author. The deceptively simple gift annuity can present many complexities, and your team will quickly come to rely on the *CGA Manual* for answers. This comprehensive book also includes prototype materials, such as letters, disclosure forms, and state filing materials, that you can customize for use with your donors. The *CGA Manual* is available in print and as a searchable electronic edition. Whether your organization has been issuing annuities for years or is just getting started, the *CGA Manual* is your must-have guide to a first-rate gift annuity program.

Visit [www.pgcalc.com/insight-training](http://www.pgcalc.com/insight-training) for educational offerings, schedules, registration information, and presenter biographies.





## Praise for PG Calc's

# Training and Webinars

“As I told my supervisor, it was the best professional training I have had in planned giving. The examples were very clear, and now I understand more about not just the software, but the vehicles themselves. As I'm new to planned giving, without a background in finance or law, I feel much more confident about approaching prospects.”

— Lee Davis

*Director of Legacy Giving, Agnes Scott College*

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“The class was great, super informative and the presenters were very attentive and knowledgeable of the software. I would certainly recommend the class to anyone who needs an introductory course or a refresher. Keep up the good work!”

— Christopher Beck

*Senior Philanthropic Advisor, ALSAC/St. Jude Children's Research Hospital*

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“We initially purchased the monthly webinars for our gift planning staff, but they provided such practical advice and substantive information, we extended an invitation to our entire development staff. The PG Calc programs provide a base of information for everyone, allowing the gift planning staff to then discuss how the techniques are best deployed for our constituency. It's a wonderful combination for all of our continuing education!”

— Jayne Whitehead

*Senior Director of Development, Miami University*