



YOUR  
PARTNER  
IN PLANNED  
GIVING  
SUCCESS

PG Box 380070  
Cambridge, MA 02238 0070

Sissy Mouse  
125 Mount Auburn St  
Anytown, MA 02138

Mail on  
Tuesday

Gift Date	Gift Key	Gift Amount	Payout %	Account #1	Reserve State	Annually	Mort Table	Reserve %	Factor	Reserve
The Auburn Society (AUB)										
11/15/1994	6	\$30,000.00	7.90000000		NY	\$2,370.00	1983 A	6.50000000	3.52898580	\$8,363.70
Quarterly 1st payment 12/31/1994										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	Bernard Boare			MA	11/24/1922	92	M		4	
12/30/1995	15	\$32,581.00	6.50000000		NY	\$2,116.46	1983 A	7.25000000	9.80622629	\$20,754.49
Quarterly 1st payment 3/31/1996										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	Sissy Mouse			NM	02/04/1946	68	F		26	
11/05/1998	22	\$50,000.00	8.30000000		MA	\$4,150.00	1983 A	6.25000000	3.55549987	\$14,755.32
Quarterly 1st payment 12/31/1998										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	Bernard Boare			MA	11/24/1922	92	M		4	
11/05/1998	23	\$10,000.00	6.00000000		CA	\$600.00	1983 A	6.25000000	4.39194911	\$1,145.51
Semiannual 1st payment 12/31/1998										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	Charisma Carpenter			CA	12/22/1925	89	F		16	
02/21/2002	28	\$50,000.00	7.70000000		NJ	\$3,850.00	Ann 2000	6.50000000	9.93194090	\$38,237.97
Quarterly 1st payment 3/31/2002										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	Martin Manatee			NJ	12/25/1935	79	M		13	
	Marina Manatee			NJ	09/03/1939	75	F		12	
07/01/2008	51	\$30,000.00	7.70000000		MA	\$2,310.00	Ann 2000	5.50000000	4.98986175	\$11,480.38
Quarterly 1st payment 9/30/2008										
	Annuitant			State	D.O.B.	Age	Gender	D.O.D.	Person Key	
	June Cleaver			MA	05/28/1925	89	F		39	
The Auburn Society (AUB)										
10/10/2014										

# Gift Administration Services

Great gift administration is the key to repeat gifts.

# Gift Administration Services

Give your donors the highest quality stewardship.

Ensure donor satisfaction with PG Calc Gift administration software and services.

- Provide world-class gift administration and donor stewardship.
- Be confident about the ongoing health of your planned giving program.
- Get answers to your gift administration questions when you need them.

## You (and Your Donors) Shouldn't Have to Compromise on Good Gift Administration

Administering planned gifts is a fundamental part of the planned giving process. Timely payments and correct tax forms are what donors expect after making a gift to your organization. Meeting these expectations opens the door to repeat gifts.

Unfortunately, many charities and financial institutions without experience in this field fall short in administration. It's not surprising; the practice requires specialized knowledge and commitment. State regulations and compliance responsibilities come with the territory. We think you should pick the asset manager who is the best fit for your organization, and then choose the best administrator to make you look good to your donors. That's where we come in.

## The Recognized Leader in Gift Administration for More Than 20 Years

Our staff has decades of experience in the operation of planned giving programs, solicitation of planned gifts, and administration of all giving arrangements. Members of our staff have worked in both banks and development offices and while at PG Calc, have assisted thousands of others in those roles. We've been through more year-ends, tax seasons, severances, and exceptions to the rule than you can possibly imagine. No wonder hundreds of charities, banks, and service providers entrust their planned gift administration to us.

When you partner with PG Calc, this expertise is at your disposal. You can call us with any question. We're here to support you in running a successful planned giving program.

## Best-in-Breed Charitable Gift Administration

Working with your team, including your advancement staff, finance staff, and asset manager, we provide complete back-office administrative services for gift annuities, pooled income funds, and charitable remainder trusts. Here are the core elements:

- Maintain donor and gift records.
- Add new gifts and process terminated gifts.
- Provide payment summaries each period.
- Print and mail checks and EFT advices of payment to your donors.
- Produce 1099-R tax forms and K-1 letters for donors and file the information with the IRS.
- Calculate FASB liability calculations and state reserve requirements.
- Provide remote access to view your gift data is available if desired.

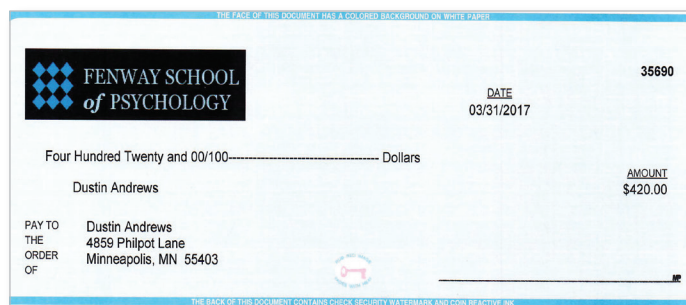
# Gift Administration Services

The industry standard for planned gift administration.

## Personal Touches Make for Great Stewardship

When you establish a planned gift, you're creating a long-term relationship with a donor. Beneficiary payments and tax forms provide regular touch points. Use this opportunity to strengthen your organization's relationship with a donor.

When PG Calc does your mailings, we can insert materials for your donors, customize the message on their check stub or EFT advice, and always have your organization's logo on both. By leveraging your organization's branding, you can ensure that your donors are continuously reminded of your mission and your value.



We customize your checks and advices with your organization's logo

## Never Worry About Being in Compliance - State Reserve and FASB Liability Compliance Reporting

Performing calculations to comply with state and federal requirements is a complex and time-consuming project. PG Calc has the experience and know-how to take on these tasks for you.

You can use our present value reports to satisfy the requirements described in FASB Statements 116 and 117 for your organization's own financial reporting purposes or for state reserve reporting.

## Benefit from the Expertise that Created the Industry Standard Gift Administration Software Tool

PG Calc's gift administration services are based on *GiftWrap*, our proprietary gift administration software. The first application of its kind, *GiftWrap* is used by hundreds of charities and financial institutions to ensure the efficient and accurate administration of their planned gift programs.

Given the sensitive and confidential nature of the data contained within its database, *GiftWrap* was designed with security in mind and is GDPR compliant. In addition, *GiftWrap* incorporates three levels of encryption for data stored in the database. Further, all *GiftWrap* data is encrypted when in transit over the internet.

With the breadth of our knowledge and flexibility, we can expertly service any organization's gift administration needs, whether you have 5 or 1,005 planned gifts to administer.

## Praise for PG Calc's

# *Gift Administration*

“ The Carter Center works with PG Calc to administer our 270 (ish) Charitable Gift Annuities . . . From their CGA calculating software to their administrative services and training, there's simply no one better at it than PG Calc. I recommend this company to you without reservation.”

— **Barry Nickelsberg**  
***Chief Development Officer for Estate and Gift Planning,  
Carter Center***

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“ PG Calc is the perfect solution for any size philanthropy office seeking gift administration services. Their administration services have significantly increased our own efficiency and proven invaluable to our donors.”

— **Laura Martino**  
***Vice President of Development, Middlesex Health***

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“ PG Calc has helped us to streamline our charitable gift annuity and charitable remainder unitrust gift process. They have provided us with a strong infrastructure for our historical data and information retention. We confidently rely on their expertise for our Planned Giving processes and necessary tax compliance and have for many years.”

— **Christine A. Festa**  
***Assistant Controller, Quinnipiac University***