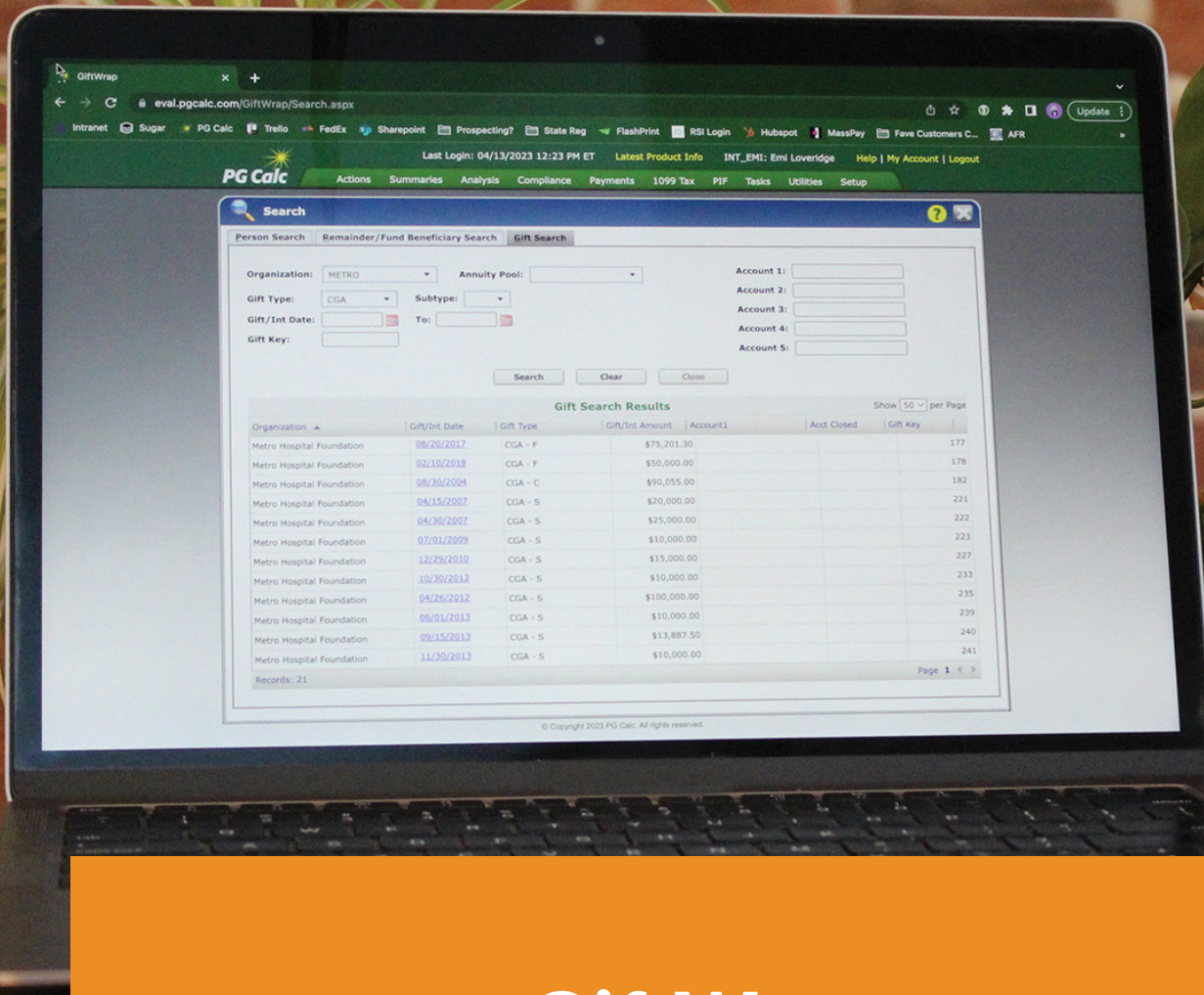




YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



GiftWrap

Improve donor stewardship and reduce program risk.

GiftWrap

GiftWrap is recognized by charities and financial institutions nationwide as the industry leader in planned gift administration software.

***GiftWrap* is your administration software of choice.**

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

PG Calc introduced *GiftWrap* to the planned giving industry in 1987 and has continued to improve it to the present day. *GiftWrap* is the most comprehensive and secure planned giving administration software on the market, making it the top choice for successful planned giving programs and the financial institutions that support them.

Enable World-Class Donor Stewardship

Happy donors are repeat donors. You can keep your donors happy and donating by providing them with timely payments, accurate tax information, and ongoing communication. Meet your donors' stewardship expectations and give them confidence that their commitment to your organization is well deserved.

- Ensure payments will be made on time, for the correct amount, and delivered to the right address, either by check or electronically.
- Fulfill donors' tax reporting requirements by generating accurate 1099-R tax information at the touch of a button.
- Maintain ongoing communication with your donors over time, ensuring continuity despite any organizational changes.

GiftWrap makes the complex simple. Rather than relying on a general purpose database or a collection of spreadsheets to maintain, track, and analyze the wealth of data associated with your planned giving program, *GiftWrap* offers you a central repository from which you can operate your gift administration program efficiently and with confidence.

Enhance Administration and Reduce Risk

Planned gifts, and the obligations they bring, represent life-long relationships between your organization and its donors. Meeting those obligations over the lifetime of the donor relationship and being consistent with best practices and regulatory requirements are crucial to the health of your program and the satisfaction of your donors. Reduce program risk, manage compliance, and enhance overall planned gift administration with *GiftWrap*. In service of that goal, *GiftWrap* allows you to:

- Meet state gift annuity reserve calculation requirements.
- Streamline the process of generating FASB liability calculations for all planned gift vehicles.
- Ensure the accuracy of all residuum distributions with up-to-date market value calculations for each gift annuity.
- Be confident that your sensitive data is secure and protected with state-of-the-art data security.
- Keep your board and management up-to-date on your planned giving program with comprehensive and informative reports and metrics.

GiftWrap

Grow your planned giving program with comprehensive reporting, tracking, administration, and more.

GiftWrap Features

General

- Track donors, beneficiaries, prospects, and advisors.
- Store detailed information for all life income gifts and bequests.
- Create reports for gift annuity reserves and FASB liabilities.
- Project cash flow expectancies for any kind of planned gift.
- Track the value of each gift over its lifetime.

Payments

- Produce payments for annuitants or beneficiaries of any type of planned gift.
- Make payments either by check or by electronic funds transfer (EFT).
- Print checks directly on check stock or produce an upload file for a separate check writing system.
- Manage payments with check register and reconciliation capabilities.

Taxes

- Print 1099-R tax forms for each annuitant and for the IRS.
- Create an upload file for electronic filing with the IRS or a form 1096 for hard copy filing.
- Produce the 1099-R summary report, which allows you to verify information prepared for annuitants and the IRS.
- Prepare K-1 tax letters for pooled income fund participants.

Reporting

- Choose from a full suite of reports that are detailed, comprehensive, and highly informative.
- Create fully integrated custom reports within the system to meet your requirements.
- Use custom filter functionality and query each report dataset to produce the desired presentation.
- Gain insight into the health of your program with reports showing which gifts are on track to meet or exceed 50% residuum target and which are in trouble.

Optional *GiftWrap* Modules

Advanced Analysis Module

- Expanded analysis tools for remainder, years to exhaustion, expectancies, and historical gift values.
- Includes comprehensive Program Overview and Statistics report.

Workflow Module

- Replace and automate paper checklists and spreadsheets with fully customizable tasks and workflows.
- Centralize and automate routine and exceptional administrative tasks.
- Involve the participation of multiple staff and require review and approval.
- Notify staff of recurring tasks.

Document Storage Module

- Store and retrieve any form of electronic document.
- Associate and search for documents at the pooled fund, organization, person, and gift levels.
- Upload documents from person and gift records.

Bequest Manager Module

- Organize and enhance legacy giving program management.
- Ensure receipt of intended distributions by getting through probate.

Pooled Fund Administration Module

- Support all tasks necessary to administer a pooled income fund.
- Unitize gifts.
- Distribute participant income.
- Produce Schedule K-1 tax form.

Enhanced Security Module

- Additional options, such as segregated hosting, SSO, TFA, IP filtering, and secure key management.

Death Screening Module

- On a daily basis, we run all your names through a third-party database to identify deceased planned gift individuals.

Praise for PG Calc's

GiftWrap

“ CBN's Treasury and Planned Giving programs have been using *GiftWrap* for years, but yesterday was my first introduction to the system. We need to prepare for the measurement of annuities written to CBN for the benefit of certain related organizations. Jeffrey Frye took the time to explain how to set up designation accounts for the related entities, how to update their current market values, and how to use Cashtrack to apply future earnings to those related annuities. He was kind, patient, and explained things very well. Jeffrey is a huge asset to your customer support team, and I wanted to pass on my appreciation to you.”

— James Kinlaw
Tax Director, The Christian Broadcasting Network, Inc.

“ Last week, I wondered if there was any way to simplify my campus gift separation of Projected Remainder Amounts from the aggregate report. I proceeded to call PG Calc, and they showed me how to apply custom filters within the *GiftWrap* Projected Remainder Amounts report to generate exactly what I needed. PG Calc saved me hours of messaging data reports, and I replied, ‘I cannot tell you how excited I am that this worked like a charm!’”

— Suzanne Cross
Consultant, University of California