

YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



PG Calc Marketing Services

We tailor an effective marketing program for you.

PG Calc Marketing Services

Planned giving marketing by planned giving professionals.

PG Calc's *Marketing Services* will let you:

- Build more awareness of your planned giving program.
- Reach donors in more ways than ever before.
- Provide timely and accurate planned giving information.
- Create new marketing campaigns without hassle.
- Spend more time building donor relationships.

PG Calc's *Marketing Services* Marks a Dramatic Expansion of Our Successful Marketing Consulting Practice

For years, we've worked with institutions to optimize donor communications for outreach, cultivation, and stewardship. That deep expertise is a key element of successful planned giving marketing. To create the tools and practices to complement that knowledge, we looked outside the gift planning world—indeed, beyond the non-profit world. We've enlisted experts from top-tier usability and design firms to ensure that your website and marketing materials will work side-by-side with your mission and message. Focus group testing confirmed the effectiveness and ease of use of the materials with representative donors and planned giving professionals.

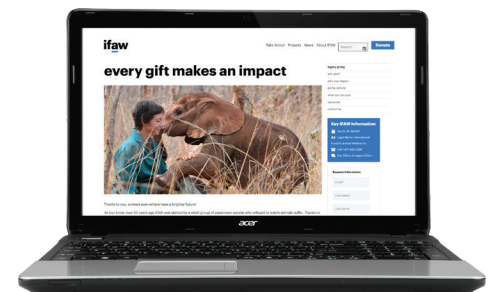
PG Calc's *Marketing Services* is built around five elements that are essential for your marketing success:

- **Expertise** Our team will guide your marketing efforts and fuel your content.
- **Sophisticated websites** built for awareness, education, and lead generation.
- **Donor Surveys** generate qualified leads and insightful donor data.
- **Compelling direct mail and email** campaigns that build awareness and drive traffic to your resource center.
- **Time** Trust us with your marketing program, and you will have more time to talk with donors and close gifts. Let us do the marketing for you.

Unmatched Customer Service—a PG Calc Tradition

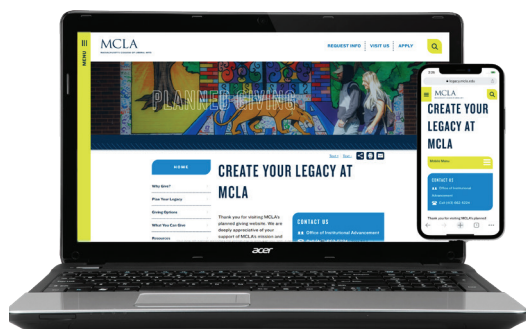
The key to your success is relationships. We feel the same way. A personalized website with supporting marketing collateral is great, but the biggest advantage of using PG Calc for your marketing is the superlative customer service you'll receive as a client. You'll see it in the one-on-one strategic planning when we help you set up your marketing efforts. You'll hear it when you call with a question or a request. It's how we've always operated, and we wouldn't have it any other way.

Our underlying goal is to make your marketing more effective. Just tell us how we can help. We can assist with every aspect of marketing, including emails, websites, direct mail, donor surveys, brochures, and much more.



A Modern and Responsive Website

Customized for your planned giving vision.



A Planned Giving Website

Your planned giving website is often the first point of contact with your donors and your planned giving program. It must educate, create trust, and build the credibility of your program. And most importantly, it must be tailored to your mission. We can help.

Our planned giving websites are resource centers that provide your donors with exactly the information they seek and leave them with a lasting impression about your mission. We eliminate the visual clutter and navigation mazes of your online presence, allowing your donors to focus on the main message and not be overwhelmed.

The look and feel of your PG Calc website will mirror your main site, giving your donors a seamless experience. Most importantly, our sites are completely customizable. You'll have the option of editing anything. But you don't have to. Most of our clients let us do all the work. We don't mind; it's why we are here, to give you the support that you need to juggle your duties and deliver effective marketing at the same time.

The sophistication of our technology also allows for ease of testing, adding new content, and making changes in real-time, thus keeping your website fresh. And if your institutional branding changes, so can your PG Calc website, at no additional cost.

As your content provider, we will make sure your planned giving content and calculations are always up-to-date. All our gift and asset examples on the website do their own math, updating automatically with changes to discount rates, ACGA tables, or tax rates. Every time a prospective donor visits your website, gift calculations will be accurate, using the current discount rate and other "behind-the-scenes" formulas. No more worrying about updating your planned giving pages due to changes in the rates or the laws. That's our responsibility.

Strategy, Analysis & Recommendations

Your marketing program constantly needs to evolve. We work closely with our clients to share best practices, analysis, and recommendations for improvements on all planned giving marketing initiatives. As a fundraiser, you need to be on the road meeting donors and not worrying about marketing your program. Partner with us, and you'll have an expert marketing team actively working to increase awareness of your planned giving program.

We hold twice yearly brainstorming sessions with you to identify goals, outline best practices, provide direction, and discuss potential improvements to your marketing initiatives. We put great emphasis on testing and boosting both your internal planned giving marketing, and the efforts developed in collaboration with PG Calc. Improving and expanding your marketing program is our goal.

Build Awareness with Direct Mail

Reach your donors with customized, branded mailings.



Constant cultivation is a key to success in fundraising, and it's no different with planned giving. Building awareness with custom direct mail that includes your organization's mission and branding is essential. We spend the extra time to make each piece eye-catching and relevant because that is what works in direct mail.

Your older donors will respond to messaging directed to them on an emotional level. Younger donors will respond similarly, however, most of your younger audience will respond because a direct mail message is different from the constant barrage of email, spam, and social media noise they receive. This makes direct mail stand out

as something different. Either way, it's the personal nature of the message that is the key. The copy must be tailored to your donors and your mission. That's what we do.

Newsletters

All our print newsletters have a distinct theme focused on a donor story.

This gift story is paired with relevant planned giving articles of your choosing.

This focus allows for increased donor understanding and comprehension.

Each newsletter is customized to the look and feel of your charity, and design best practices are applied to achieve all your objectives. We create the design, layout, and content made to order in your brand.

This does not mean you will be stuck with the same generic newsletter content or design that everyone has; every newsletter is made to order. Special requests are encouraged and executed.



Postcards & Self-Mailers

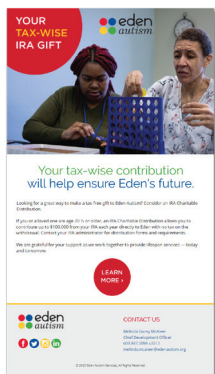
We start our custom postcards with each charity's style, brand, and imagery, and then mix in specific planned giving messaging and mission copy. Lastly, we always include a custom call to action for each charity. This includes a link to your website, and if it is a PG Calc designed website, then we will create the landing page and test and track its effectiveness

Our custom self-mailers use the same process as our postcards. The difference is that we have some extra room for messaging and mission copy as well as a reply card. Nothing is ever boilerplate.



A Multi-Channel Approach

Customized emails to build your mission.



Email can be the quickest and most cost-effective way of conveying your planned giving message. But don't stop your direct mail plan just yet. Remember, the best email campaigns only receive a 50% open rate, with even fewer reading. Your digital messaging must be relevant to your donors to elicit a response. Sending a weekly email just to send email, or sending a syndicated, pre-written message will not build awareness. That's the quickest way to the "delete and/or unsubscribe" file.

Effective email needs to be customized to your donor's needs and generate engagement. If your email is well-written, personal, and a benefit to your donors, then this channel will build relationships faster and more cheaply than anything else. Email marketing campaigns can take many forms, and PG Calc can help you with all of them.

E-Newsletters

Like a print newsletter, each e-newsletter should have a distinct theme focused on a donor story, and then be paired with relevant planned giving articles. Your e-newsletter can be a digital version of your print newsletter for maximum exposure to your targeted list, or it can be written as a separate marketing piece. Each e-newsletter is customized to the look and feel of the charity, and design best practices are applied to achieve objectives. We create the design, layout the e-newsletter in HTML, and write the content made to order in your brand. Our goal is to make every e-newsletter a benefit to your donors. Sending consistent emails because you think you need to send something will only lead to unsubscribes and spam complaints. We make sure your e-newsletter is interesting, educational, and entertaining. In other words, "a good read."

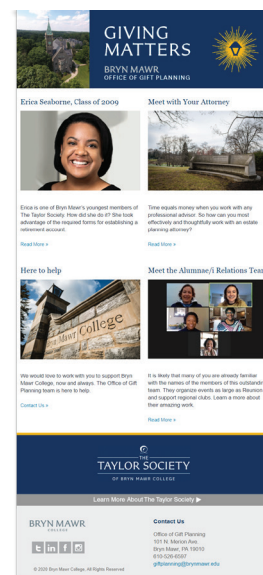
Single Issue Emails

Several times per year you may want to send your donors email on a particular topic, such as to update Qualified Charitable Distribution (QCD) information. This type of campaign can be used for awareness building or updating donors on changes in the law. This kind of well-crafted email strategy allows your donors to not only begin to see planned giving as a viable option to support your mission, but also to see you as a trusted friend. We create the design, layout in HTML, and use content made to order in your brand. The subject matter of this type of email must be created to assist and benefit your donors.

Follow-up Emails

Many planned giving marketers are using an integrated approach by using email to support all direct mail campaigns. Email can reference the direct mail piece, provide additional follow-up information, and include a link to a landing page.

Sending a consistent message using two different mediums to touch your donors can have a dramatic effect on the success of the overall campaign. Once again, this must be customized to work. A canned message falls terribly short.



Learn More about Your Donors

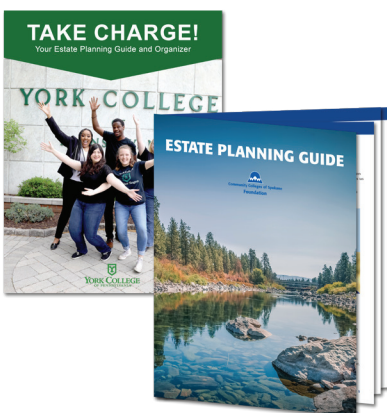
Grow donor engagement with our suite of marketing materials.

Brochures

A brochure is the best option to equip a prospective donor with a quick understanding of your organization and provide an overview of any planned giving related subject matter. It is easy to share and leaves a lasting impression.

For use as fulfillment pieces, donor visit leave-behinds, or event handouts, our brochures are customized to the look and feel of your institution, and design best practices are applied to achieve your objectives. We create the design, layout, and content made to order in your brand. We never use pre-written text, and the messaging is always presented in context with your mission. We can create a brochure on any planned giving subject, from general estate planning to charitable gift annuities to end of year giving.

We write each brochure independently incorporating your messaging, mission, and voice. Every word can be edited.



Planning Guides

All our planned giving websites come with a PDF Estate Planning Guide and Organizer to drive traffic to your site. A print version is available for an extra charge.

In this PDF, we describe the key elements of an estate plan, the documents donors should have, and some charitable giving ideas donors might want to incorporate into their plan. This is a perfect tool for donors to record personal and financial information that they may need to share with family and to create their estate plan.

Donor Surveys

A planned giving donor survey is a fantastic way to learn more about your donors and keep the channels of communication open. A survey can generate qualified leads and insightful data on your donors, such as what or who impacts their giving decisions, their interest in a future gift, as well as identifying existing gift intentions.

At PG Calc we provide:

- Strategy and best practices.
- An introductory email.
- Survey questions.
- Survey page hosting.
- Tabulations with exports to excel.



Create Your Customized Marketing Plan

We work with you to connect with your donors.

No planned giving program is the same, so why should your marketing program be cookie cutter? At PG Calc, we will help you create a marketing plan that is tailored to your planned giving program. You can pick and choose only what you need and add to it as your needs grow. You deserve to have flexibility and freedom to fulfill your planned giving goals.

Choose Some or All of These Six Steps:

1 Start with a **Planned Giving Website**, including:

- Planned giving content, including downloadable online brochures and an Estate Planning Guide.
- *GiftCalcs* interactive online calculator.
- An interactive quiz and widgets for QCDs and DAFs.
- Semi-annual website reporting, analysis, and recommendations.
- Dedicated landing pages for all efforts, including ones you do yourself.
- Strategic brainstorming sessions to integrate your website with your marketing goals.

2 Add camera-ready **Direct Mail** for marketing pushes, such as:

- Newsletters – 20.5" x 11", folds into two 8.5" x 11" panels, self-mailer with attached reply form, and branded to your institution.
- Self-Mailers – 17" x 6", folds in half into 8.5" x 6" with attached reply form, and branded to your institution.
- Postcards – 8.5" x 6", and branded to your institution.
- Bucksip Insert – 8" x 3.5", and branded to your institution.

3 Add **Email Marketing** for additional pushes, such as:

- Email Newsletters – In HTML and branded to your institution.
- Single Issue/Follow-up Emails – In HTML and branded to your institution.

4 Add **Fulfillment Collateral** to respond to inquiries and as leave-behinds:

- Fulfillment brochures – 8.5" x 11", folds into three panels, camera-ready, and branded to your institution.
- Sell Sheets – 8.5" x 11", camera-ready, and branded to your institution.

5 Add a **Donor Survey** to identify prospects and existing gift intentions.

6 Add **Software** to close the gift:

- *Planned Giving Manager Anywhere* (*PGM Anywhere*) – Planned giving calculations and proposal software. In some cases, the cost for *PGM Anywhere*'s annual service is waived with the purchase of a *Marketing Services* plan, and the service fee remains waived as long as you contract with us for *Marketing Services*. Please contact us for details.

Praise for PG Calc's

Marketing Services

“Working with Andrew [Palmer] and PG Calc on our survey was an enjoyable and rewarding process. We were able to customize the questions for our tone and brand. The survey continues to return on its value with new legacy society members and gift conversations.”

— Rebecca Zuck

Director of Planned Giving, Brown University

“PG Calc's *Marketing Services* Team provides us essential expertise and peace of mind knowing that our website is up-to-date and content-rich, and our marketing pieces are spot-on in content, style, and effectiveness. Members of the PG Calc team are force-multipliers for our planned giving program's success thanks to their wealth of experience and knowledge. Most of all, the PG Calc Team is great to work with, always available for help, and super-responsive to our needs.”

— Kent Alley

Director of Planned Giving, Episcopal High School

“With PG Calc, we get the benefit of decades of expertise in planned giving marketing and a true collaboration. The team is responsive, creative and proactive, often reaching out to us with insight and ideas. The website they designed is on brand and beautiful, as well as easy to navigate. Print pieces are well designed and effective. We are a small client, but they always make us feel important. Our planned giving program is growing and we expect our partnership with PG Calc to grow along with it.”

— Suzanne Fortier

Chief Philanthropy Officer, HopeHealth