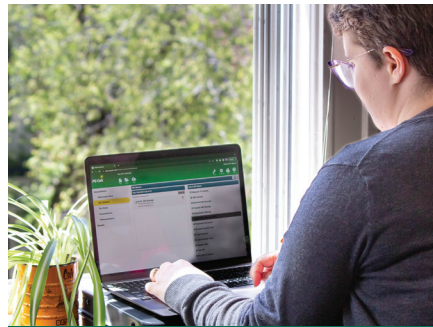




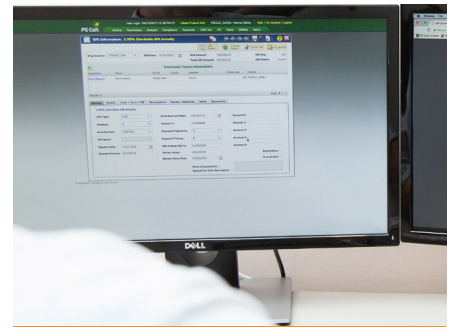
Everything You Need for a Successful Planned Giving Program



Consulting for Gift Annuities

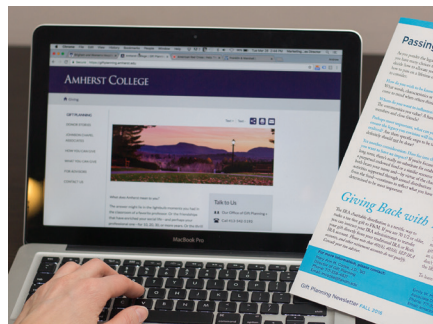


Planned Giving Manager



GiftWrap

Endowment Sub-Accounting



Marketing Services



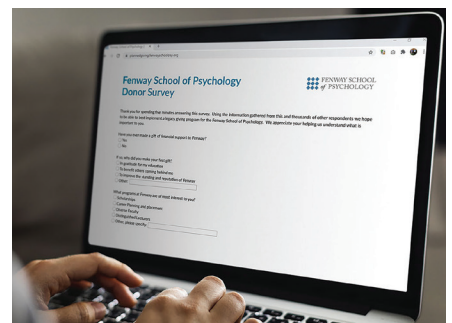
Consulting Services



Education



Gift Administration Services



and More...

About PG Calc

PG Calc has everything you need to build and sustain a successful planned giving program.

PG Calc is one of the most respected companies in planned giving, and we have our many clients to thank for that.

Beginning in 1985 with the introduction of *Planned Giving Manager*, our signature planned giving calculation software, we have steadily grown and enhanced our capabilities. Today, we offer a full range of planned giving products and services, all informed by our decades of gift planning experience, and remain committed to contributing insights and educational opportunities that advance our profession. PG Calc is the planned giving division of Foundation Source, the leading provider of charitable giving technology, administration, and expertise. We offer:

- **Marketing Services:**

Effective marketing is essential to the success of every planned giving program. We offer everything from planned giving website creation, to emails and newsletters, to direct mail, to the calculation tools and customized brochures that inspire and motivate your donors.

- **Gift Illustrations:**

We provide software and services to assist you with gift proposals at every level. *PGM Anywhere*, the industry's leading planned giving calculation software, creates proposals and agreements for all types of gifts.

- **Gift Administration:**

Administering a planned giving program is a time-consuming and complex endeavor. Our tools, services, and expertise can take away the headaches of making payments, sending tax information, tracking gift values, complying with state requirements, and so much more.

- **Consulting:**

PG Calc will be your planned giving partner. We will objectively evaluate your organization's suitability for a planned giving and/or annuity program, help you run your planned giving program, ensure you stay in compliance, and assess your program risk.

- **Insight & Education:**

PG Calc offers information, resources, and training to help you run a successful planned giving program and keep you current on the latest trends, best practices, and policy developments impacting planned giving.

Committed to Excellence

Since the day we were founded, we have sought to achieve excellence in everything we do. Commitment of this kind has helped us establish trust with thousands of charitable organizations of every size and category, including education, healthcare, religion, the arts, social services, and more.

Because of their confidence in us, many of America's largest charities rely on PG Calc to help them with all aspects of their planned giving programs, from launch, to marketing, to closing gifts, to providing outstanding gift administration — all so donors will want to give again.

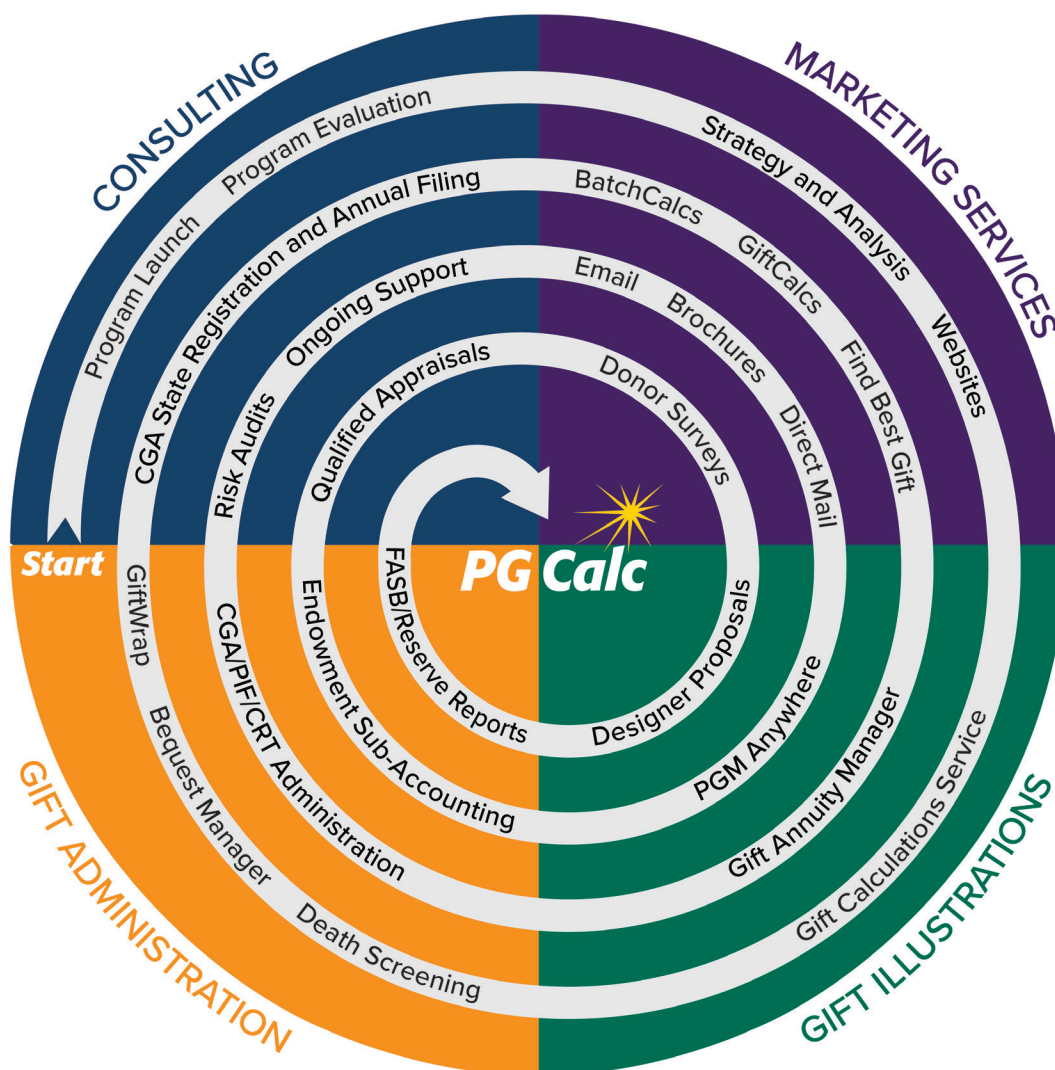
Contributing to the success of the organizations we serve and the for-profit firms that support them is our mission. How can we support yours?

PG Calc and Planned Giving

How we partner in your planned giving success.

Through every stage of building and growing your planned giving program, PG Calc has the tools, knowledge, and experience to ensure your organization's planned giving success.

Here is how PG Calc's products and services align with the evolution of an organization's planned giving program:



Insight & Education

PG Calc-U-Letter • Monthly eRate • PG Calc Blog • Featured Articles • Knowledge Base
CGA Manual • Software Orientations • Software Trainings • Custom Instruction • Webinars

Marketing Services

We create an effective, customized marketing program for you.

PG Calc's marketing solutions 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.
- Motivate your donors with marketing designed for impact.
- Leverage our expertise to take the guesswork out of your marketing.

PG Calc's Marketing Services Is Built Around Four Elements That Are Essential for Your Marketing Success:

- **Expertise** Our team will guide your marketing efforts and fuel your content.
- **Sophisticated websites** for awareness, education, and lead generation.
- **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. Your marketing will no longer take a backseat to travel and will work in concert with your donor outreach.

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, brochures, marketing strategy, and much more.

A Planned Giving Website

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 avoid visual clutter and navigation mazes, 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. If your institutional branding changes, so can your PG Calc website, at no additional cost. As your content provider, we will make sure all the information on your planned giving website is up to date. Every time a prospective donor visits your website, sample gift calculations will be accurate. No more worrying about updating your planned giving pages due to changes in rates or laws. That's our responsibility.

Strategy, Analysis, and 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. Partner with PG Calc and you'll have an expert marketing team actively working to increase awareness of your planned giving program.

Marketing Services

Let us do the work so you can close more gifts.

Direct Mail

Building awareness with custom direct mail that includes your organization's mission and branding is essential. All our print newsletters have a distinct theme built around a donor story. This donor story is paired with relevant planned giving articles of your choosing. This approach maximizes donor understanding and comprehension. Nothing is ever boilerplate.

Our postcards and self-mailers use your style, brand, and imagery. They always include a custom call to action as well. If you have a PG Calc-designed website, then we will create a landing page for responders to go to, allowing us to test and track the effectiveness of each message.



Email

Effective email needs to be customized to your donors' needs and generate engagement. Email marketing campaigns can take many forms, and PG Calc can help you with all of them, including e-newsletters, single-issue emails, and direct mail follow-up. We create the design, lay it out in HTML, and write the content made to order using your branding. We make sure your email is interesting, educational, and entertaining — in other words, “a good read.”

Brochures

A brochure is the best option for equipping a prospective donor with a quick understanding of your organization and providing an overview of any planned gift. We create the design and layout, and the content is always made to order. We never use pre-written text, and the messaging is always presented in the context of your mission. As with our planned giving websites and all our marketing materials, every word can be edited.

Custom Packages

No planned giving program is the same, so why should your marketing program be cookie cutter? At PG Calc, you create your own custom package. Pick and choose only what you need and add to it as your needs grow. From a website-only option to more comprehensive packages that include a primary copy of *PGM Anywhere* at no additional charge, we give you the flexibility to achieve your marketing goals and objectives.

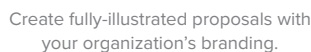
Your marketing program must educate, create trust, and reinforce the credibility of your institution. Most importantly, it must be carefully tailored to support your mission. How can we help your organization market itself better?



- Persuade your donors with compelling gift illustrations.
- Provide your donors with closing documents when they're ready to make a gift.
- Help your donors make a planned gift that best meets their goals.

- **Introduce concepts** Produce compelling diagrams and concise gift descriptions written in plain English.
- **Explore “what ifs”** Show the benefits of any planned gift. Refine calculations in seconds. Compare your choice of gifts or gift amounts side-by-side.
- **Share in-depth analyses** Provide simple or sophisticated projections that will satisfy the most demanding donor or advisor.
- **Provide closing documents** Create documents to acknowledge a gift, produce a gift annuity agreement for any of the 50 states, substantiate a charitable deduction, and more.
- **Get authoritative answers to your questions** PG Calc experts are available to answer your software and gift planning questions.

- **Create proposals on any device** Run *PGM Anywhere* on a tablet, laptop, or phone. All you need is an Internet connection.
- **Simple enough to use with a donor** *PGM Anywhere*'s design makes it a pleasure to use by yourself or with a donor by your side.
- **Designer Proposals module** Create professional-quality personalized proposals that appeal to your donor's head *and* heart. Available in 1-page, 2-page, and 4-page formats.
- **Easily collaborate with colleagues** *PGM Anywhere* allows you to save gift illustrations in one convenient web-based database, so your team can always work together on the latest donor proposals.
- **Nothing to install or update** We do it for you, including automatic updates.



Gift Illustrations

BatchCalcs and *GiftCalcs* are two other ways PG Calc's calculations can be personalized and put to use to generate leads.

Personalization with *BatchCalcs*: A Key Component of Gift Annuity Mailing Success

PG Calc's *BatchCalcs* Service allows you to provide personalized calculations to potential donors, making your gift annuity mailings more persuasive.

For example, you can use *BatchCalcs* to include the annuity amount, charitable deduction, and tax-free portion each recipient can expect. All we need from you is an Excel file containing recipient ages or birth dates and, if you wish, target gift amounts.

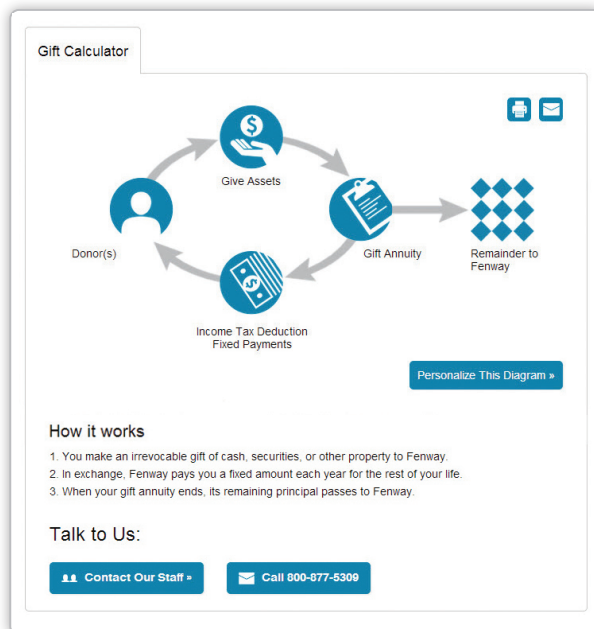
What could be more compelling than to spell out the gift benefits specific to each individual on your gift annuity prospect list?

Start the Conversation About Planned Giving with Personalized Calculations from *GiftCalcs*

You work hard to attract visitors to your website — but that's only half the battle. Once at your website, your visitors need to be engaged, educated, and encouraged to take action — and taking action is the key. Interactive content generates twice as many conversions — the key points where a visitor makes the next move — as passive content does.

GiftCalcs is a web-based calculator that enables your website visitors to explore different gift options for themselves. A "How it Works" diagram explains the gift, which the visitor can then update with personalized numbers that show the benefits of the gift. This dynamic process encourages visitors to move further along in their decision making, increasing the likelihood that qualified prospects will contact you.

Sample *BatchCalcs* letter



Customize *GiftCalcs*' Appearance

- A. Brand with your charity's logo
- B. Change the diagram and button colors, and even the button text
- C. Edit the "How it Works" description text for any gift type
- D. Provide contact information using customizable buttons

Gift Administration: Software

PG Calc's *GiftWrap* and *Bequest Manager* are software programs for professional in-house planned gift administration.

Ensure donor satisfaction with PG Calc's *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.

Provide World-Class Administration with *GiftWrap*

Happy donors are repeat donors. You can keep your donors happy and more likely to keep giving 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.
- Generate accurate 1099-R tax information for your gift annuitants at the touch of a button.
- Keep your board and staff up to date on your planned giving program with comprehensive and informative reports and metrics.
- Meet state gift annuity reserve calculation requirements and 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.
- Select from among the following optional modules: Advanced Analysis, Workflow, Bequest Manager, Pooled Fund Administration, Document Storage, Payment and Tax, and Enhanced Security.

Get Organized and Be Efficient with *Bequest Manager*

PG Calc's *Bequest Manager* is the only database program available that is built specifically for managing legacy gifts. It provides you with comprehensive data management tools to book intended bequests, administer active bequests, and report on projected remainder amounts. *Bequest Manager* will help you turn bequest intentions into realized gifts and track them through probate and final distribution, so your organization receives all the dollars it deserves.

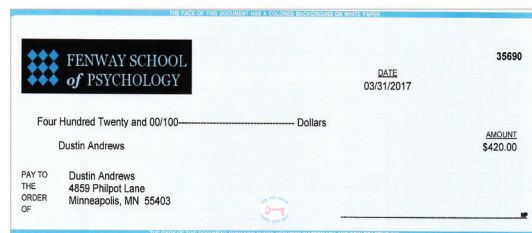
With *Bequest Manager*, you have a centralized database from which to manage your legacy gifts, from first notification of gift intention through the completion of the probate process. *Bequest Manager* is available on a stand-alone basis or as an optional module of the *GiftWrap* planned gift administration system.

Gift Administration: Services

Outsourced services for successful planned giving administration.

Outsourcing Can Improve Your Bottom Line

If you're looking to save time and make sure you're administering CGA, PIF, and CRT gifts correctly, our *Gift Administration Services* may be right for you. Administration is a key component of your planned giving program. Timely payments and correctly-prepared 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 their administration. It's not surprising — the practice requires specialized knowledge and commitment. State regulations can be confusing, 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 Nearly Forty Years

Our staff has decades of experience in the operation of planned giving programs, solicitation of planned gifts, and administration of all gift arrangements. 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.

Working with your asset manager, we provide complete back-office administrative services for gift annuities, pooled income funds, and charitable remainder trusts. When PG Calc does your mailings, we seamlessly leverage your organization's branding so you can ensure that your donors are continuously reminded of your mission and your value.

Never Worry About Being in Compliance

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 or for state annuity reserve reporting. If you prefer, we'll take care of the state annuity reserve filing, including actuarial verification of your reserve reports where required (see our *Consulting: Gift Annuities* section for more details).

The Best Planned Giving Programs Use the Best Software and Receive the Best Advice

SERVICE OFFERED	DATABASE MANAGEMENT	FASB 116/117 REPORTS	STATE RESERVES REPORTS	PAYMENT SUMMARIES	1099-Rs/K1s (THE IRS)	CHECKS TO DONORS	ELECTRONIC PAYMENTS TO DONORS	ANNUAL FILING
Compliance	X	X	X					X
Basic Services	X	X	X	X	X			
Payment Processing with ACH	X	X	X	X	X	X	X	

Gift Administration: Services

Endowment Sub-Accounting: accuracy, customized reporting, and peace of mind.

PG Calc's *Endowment Sub-Accounting Service* is an outsourced solution for non-profits and service providers that want to combine gifts for investment purposes or that combine the endowments of chapters or affiliates and need multi-level sub-accounting and unitization of their gifts. Here is how PG Calc can help:


- Unitization of new gifts and withdrawals.
- Allocation of interest, dividends, fees, expenses, and gains/losses.
- Summary statements and detailed sub-account reports – the perfect accompaniment for donor stewardship reports – delivered monthly, quarterly, semi-annually, or annually.

PG Calc's *Endowment Sub-Accounting Service* can greatly reduce the time your organization needs to spend developing reports and give you the peace of mind that they are accurate and clear.

Reports

As part of our *Endowment Sub-Accounting Service*, PG Calc provides three reports that can be customized and include your organization's logo:

- The Summary Report is designed to give a consolidated view of all the sub-accounts for an endowment. We can group the sub-accounts for subtotaling purposes and show a grand total for the endowment.
- The Donor Report is a great tool for stewarding your donors. It's designed to give a detailed view of each sub-account for an endowment.
- The Changes in Endowment Net Assets (ASU 2016-14) Report uses information already available from the work performed throughout the year, greatly saving time for business officers and auditors.

<div> FENWAY SCHOOL of PSYCHOLOGY</div> <div>Custom Endowment Rollforward Report</div> <div>For the period 01-01-2020 through 12-31-2020</div>														
	GLSD	Endowment Name	Net Asset Classification	Beginning Market Value	Interest / Dividends	Realized Gains (Losses)	Unrealized Gains (Losses)	Investment Fees	Administrative Fees	Gifts	Distributions	Internal Transfers	Ending Market Value	End Historical Gift
Chair	600010	Biology Chair	Temporarily restricted	198,548.70	3,754.86	4,429.47	1,521.57	(2,127.76)	(71.00)	100,000.00	(6,949.20)	0.00	299,106.64	245,000.00
	600020	Law School Unrestricted	Temporarily restricted	399,702.44	5,898.78	6,742.49	2,306.01	(3,342.65)	(119.60)	0.00	(13,989.59)	0.00	397,197.88	275,000.00
	600005	Management Chair	Permanently restricted	378,806.65	5,590.41	6,389.98	2,185.46	(3,167.89)	(113.34)	0.00	(13,258.23)	0.00	376,433.04	260,350.00
	600006	Management Chair Quasi	Unrestricted	33,513.21	494.57	565.33	193.39	(280.29)	(10.03)	0.00	(1,172.96)	0.00	33,303.22	22,500.00
	600002	Marketing Chair	Permanently restricted	14,763.84	294.10	336.28	114.51	(166.67)	(5.59)	5,000.00	(316.73)	0.00	19,819.74	10,000.00
	600003	Marketing Chair Quasi Fund	Unrestricted	14,817.51	218.68	249.97	85.47	(123.92)	(4.42)	0.00	(338.61)	0.00	14,724.68	10,000.00
	Chair Totals:			1,040,152.35	16,251.40	18,713.52	6,406.41	(9,209.18)	(323.98)	105,000.00	(36,405.32)	0.00	1,140,585.20	822,850.00
Lectures	600021	Biology Lecture	Permanently restricted	818,423.64	12,078.24	13,805.77	4,721.74	(8,844.33)	(244.89)	0.00	(28,644.83)	0.00	813,295.34	635,000.00
	600017	Mathematics Lectureship	Permanently restricted	192,374.08	2,839.04	3,245.11	1,109.86	(1,608.79)	(37.57)	0.00	(6,733.99)	0.00	191,168.44	125,000.00
Lectures Totals:				1,010,797.72	14,917.28	17,050.88	5,831.60	(8,453.12)	(302.46)	0.00	(35,377.92)	0.00	1,004,463.78	760,000.00
Library	600011	Law Library	Permanently restricted	280,763.17	4,143.47	4,736.12	1,619.85	(2,347.99)	(84.01)	0.00	(9,826.71)	0.00	279,003.90	191,000.00
	600012	Library Fund	Temporarily restricted	562,783.05	8,305.50	9,493.44	3,246.86	(4,706.43)	(168.38)	0.00	(19,697.41)	0.00	559,256.63	371,792.82
Library Totals:				843,546.22	12,448.97	14,229.56	4,866.71	(7,054.42)	(252.39)	0.00	(29,524.12)	0.00	838,260.53	562,792.82
Other	600008	Annual Fund	Unrestricted	19,864,900.11	293,164.81	335,095.39	114,607.34	(166,126.62)	(5,943.95)	0.00	(695,271.50)	0.00	19,740,425.58	12,181,588.74
	600007	President's Fund	Unrestricted	1,583,666.65	27,183.43	31,076.73	10,601.52	(15,403.96)	(531.81)	250,000.00	(55,428.33)	0.00	1,831,164.23	1,250,000.00
	600000	Unrestricted Fund	Unrestricted	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Totals:				21,448,566.76	320,348.24	366,172.12	125,208.86	(181,530.58)	(6,475.76)	250,000.00	(750,699.83)	0.00	21,571,589.81	13,431,588.74
Prize	600014	Biology Prize Fund	Temporarily restricted	3,345.15	49.35	56.43	19.30	(27.96)	(1.00)	0.00	(117.08)	0.00	3,324.19	2,200.00
	600015	Management Award	Permanently restricted	287,645.24	4,245.04	4,852.20	1,659.54	(2,405.53)	(86.06)	0.00	(10,067.58)	0.00	285,842.85	140,000.00
	600018	Mathematics Quasi	Unrestricted	408,544.76	6,029.25	6,891.62	2,357.08	(3,416.60)	(122.24)	0.00	(14,299.07)	0.00	405,984.80	279,369.50
Prize Totals:				699,535.15	10,323.64	11,800.25	4,035.92	(5,859.09)	(209.30)	0.00	(24,483.73)	0.00	695,151.84	421,569.50
Scholarship	600009	Bullet Fund	Unrestricted	562,578.26	8,331.72	9,587.44	3,284.70	(4,721.31)	(168.34)	23,456.78	(19,690.24)	0.00	582,659.01	397,071.22
	600019	Biology Quasi	Unrestricted	222,362.57	3,280.14	3,740.28	1,282.30	(1,858.73)	(66.51)	0.00	(2,770.19)	0.00	230,869.86	150,000.00
	600013	Book Fund	Permanently restricted	330,241.58	4,873.66	5,570.77	1,905.29	(2,761.76)	(98.81)	0.00	(11,558.46)	0.00	328,172.27	237,500.00
	600016	Law School Scholarship	Permanently restricted	101,529.82	1,498.37	1,712.68	585.75	(849.07)	(30.37)	0.00	(3,553.54)	0.00	100,893.64	75,000.00
	600001	Management Scholarship	Temporarily restricted	96,532.16	1,468.89	1,678.99	574.23	(832.37)	(29.80)	0.00	(3,483.63)	0.00	98,908.47	66,500.00
Scholarship Totals:	600004	Marketing Scholarship	Temporarily restricted	141,257.41	2,084.65	2,382.83	814.97	(1,181.31)	(42.28)	0.00	(4,944.01)	0.00	140,372.26	115,090.16
				1,451,401.80	21,337.43	24,681.99	8,447.24	(12,204.55)	(436.11)	23,456.78	(51,009.07)	0.00	1,471,875.51	1,042,061.38
Total:				26,500,000.00	399,826.96	451,648.32	154,796.74	(224,301.94)	(8,000.00)	378,456.78	(927,499.99)	0.00	26,711,936.87	17,040,862.24
Report Date: 02-09-2021 Page: 1 of 1														

Summary Report in Excel

Consulting

Whether you are just starting a planned giving program or your program has been around for decades, we have everything you need.

PG Calc's experts will help you:

- Create and manage infrastructure.
- Set goals for success.
- Create marketing strategies.
- Be in compliance
- Manage risk.
- Improve your working practices.

Every program, regardless of its simplicity or intricacies, can use a little help along the way. PG Calc has seen it all — from one-person shops struggling to get off the ground, to offices with many gift officers carrying a full agenda of fundraising, programmatic, and organizational challenges.

How We Help You

- We provide subject matter expertise and professional leadership to help you succeed.
- We engage with you on an ongoing basis to guide you and improve your planned giving program.
- If you are a seasoned gift planning officer, we have expert resources for handling complex gifts.
- We provide consultation with donors and professional advisors.
- We share simple and sophisticated methods to improve your marketing results.
- We specialize in educating staff and board members on how to identify a planned gift prospect and what to do (and not do) next.
- PG Calc even offers a qualified appraisal service for donors who terminate their planned gift early and need an appraisal to support a charitable deduction of over \$5,000.

Program Evaluation and Strategy

If you want to improve your gift planning efforts, you have to know where you are, what you have, and where you want to go.

Our team immerses itself in your operations. Through a combination of data, interviews, and observation, we gather what we need to perform a comprehensive evaluation of your program. This review identifies key areas that can be enhanced, resulting in a program that is more productive and more successful.

PG Calc is proficient at understanding the challenges and opportunities of each of our unique clients. Our recommendations will give you realistic measurement tools to succeed at planned giving fundraising.

Program Launch

Do you already have a gift planning program? If the answer is “sort of” or “we’re working on it,” you have come to the right place. It’s common to find charities that have fundraised for years but only dabbled, at best, in planned giving. We can start wherever you find yourself and help you build a planned giving program that gets results.

Consulting: Gift Annuities

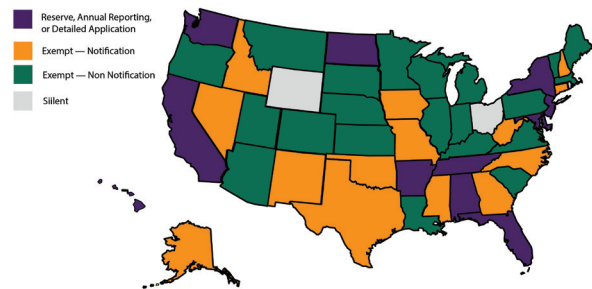
Keep your gift annuity program compliant and avoid risk.

Gift annuities are a simple way for donors to support your organization but can be complex for the charity issuing them. We have the answers to all of your questions.

Initial State Registration for Gift Annuities

We can ensure compliance with the state regulations that apply to your organization by:

- Reviewing the regulations in each state with you.
- Assisting with applications and notification letters.
- Preparing state forms and prototype gift annuity agreements.
- Assisting with inquiries and requests from state officials.



States by Regulation Category

Discover what you don't know. The first step in state registration isn't filling out a form – it's talking to an expert about the benefits and costs associated with gift annuity state registration. Working with us ensures you are in compliance with state regulations and will avoid unnecessary work and costly fees. Our state registration consultants, led by nationally-recognized expert Edie Matulka, have a wisdom about the nature of the regulatory process that is entirely unique.

Annual State Filing for Gift Annuities

Annual filings vary significantly state to state, and due dates range throughout the year. We help streamline the filing process to eliminate the worry of lapsed compliance or state fines and save you time, so you can focus on fundraising.

There are many ongoing requirements that an organization must meet once it has registered to issue gift annuities. We spend the time tracking deadlines and documents, so that you don't have to. We ensure timely filings, so that you're not at risk of losing your exemption from (and then becoming subject to) a state's full insurance code.

Gift Annuity Risk Assessment

Your gift annuity program should be helping your organization achieve its mission, so make sure your program is performing at a healthy level and is not at risk. Without proper oversight and management, serious problems can cost you money. PG Calc can help ensure everything is running well and put your leadership and your business office at ease.

A Gift Annuity Risk Audit Includes:

- Implementing risk management.
- Projecting annuity profitability and cash flows.
- Analyzing out-of-pocket liabilities.
- Checking regulatory compliance.
- Assessing adequacy of reserves.
- Comparing the impact of different investment returns.

Insight & Education

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

PG Calc's education offerings will help you:

- Increase your expertise.
- Build confidence with prospects.
- Engage and inspire your donors.
- Strengthen your program.
- Stay abreast of best practices and the impact of policy changes.
- Discover how to best use our software to save yourself time and stay focused on fundraising.

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 gift officer who wants to master planned giving, 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.

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 insight and expertise to enhance your team's planned giving knowledge. They address a wide array of gift planning topics ranging from tax basics and state regulations to current research and marketing. Our webinar presenters include senior PG Calc staff and other expert practitioners.

Blog

PG Calc's regularly-updated blog features deep dives into the latest topics and issues in planned giving.

eRate Monthly E-newsletter

Our monthly electronic newsletter contains the latest IRS discount rate and articles on planned giving topics of interest.

PG Calc-U-Letter

PG Calc's quarterly newsletter for clients contains planned giving insights, as well as updates and tips about PG Calc software and services.

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. Gift annuities can present many complexities, and your team will quickly come to rely on the *CGA Manual* for answers. The *CGA Manual* is available in print and searchable electronic editions.

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.

Insight & Education

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

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 our software's functionality.

PG Calc offers a comprehensive suite of training opportunities for *PGM Anywhere*, *GiftWrap*, and *Bequest Manager*. These software training sessions are designed to help you gain greater understanding about gift planning and gift administration techniques, improve your ability to explain gift concepts to donors, and increase productivity.

Group Training Seminars These informative sessions on gift planning or gift administration are offered throughout the year. Peer-to-peer sharing and networking are additional benefits of group training.

Distance Learning For those who want software training but aren't able to travel or wish to focus on only a few key topics, distance learning is very effective. Today's technology allows us to share screens, illustrate concepts, and respond to questions as if we were in the same room.

Custom On-Site Training Minimize the time you and your team spend away from working with donors by having a PG Calc instructor come to your office. You can use the standard curriculum, or PG Calc can create a customized session tailored to your team's needs.

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

Knowledge Base Search PG Calc's online Knowledge Base for in-depth articles on planned giving topics, definitions, and solutions to common questions.



PG Calc's History

35+ years of planned giving expertise.

1982

Founders begin working at Harvard Planned Giving Office

1985

PG Calc is incorporated in Cambridge, MA and *PGM 1.0* is released

1987

GiftWrap and *Pooled Fund Organizer* are introduced

1994

PG Calc welcomes its 1,000th client

1995

PG Calc website goes live

1996

First Windows version of *PGM* is released

1997

PG Calc acquires Blackbaud's Paragon planned giving software and clients

1999

PG Calc inaugurates *GiftCalcs*, the online gift calculation service

2001

PG Calc launches *Gift Administration Services*

2005

PG Calc acquires Planned Giving Services and celebrates 20 years

2006

BatchCalcs adds personalized planned gift calculations to a client mailing for the first time

2007

PG Calc Webinars begin

2009

Gary Pforzheimer is elected chair of NCPG; Jeff Lydenberg follows to lead PPP in 2013

2010

PG Calc named one of *Boston Business Journal's* Best Places to Work

2013

PG Calc brings *Bequest Manager* to market

2014

PG Calc launches *Marketing Services* and *PGM Anywhere*

2016

PG Calc's *CGA State Annual Filing Service* is greatly expanded

2018

PG Calc acquires Hemmenway & Reinhardt

2019

PG Calc offers *Endowment Sub-Accounting* as a service

2021

PG Calc successfully passes its expanded SOC 2 Type II audit

2024

PG Calc becomes the Planned Giving Division of Foundation Source

Praise for PG Calc

“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

“PGM *Anywhere* has been an outstanding partner to our organization. We count on it for accurate trust and CGA calculations and proposals. The PG Calc staff is always accessible and tremendously knowledgeable so that we feel confident our donors are receiving the most up-to-date and accurate information. *PGM Anywhere* does a great job of customization and is a delight to work with.”

— Debbie Roberts, JD

Senior Planned Giving Manager, The Trust for Public Land

“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 for Marketing, Development and Community Programs, Middlesex Hospital

“Jeff Lydenberg . . . and the entire team at PG Calc offer invaluable support to me and my Development colleagues at Mass General Hospital. Their work with us over the last many years as consultants has been wide-ranging and includes, but has not been limited to, assisting leadership in long-range planning, working hand-in-hand to build program plans and providing guidance and advice in our work with donors and their advisors . . . Their expertise, steady counsel and creativity have been instrumental in the evolution of our program on every front. The PG Calc staff are responsive, collaborative, and great champions for the organizations with which they work. We at Mass General consider ourselves so fortunate to have PG Calc’s partnership in our daily work.”

— Elizabeth A. Murphy

Managing Director, Planned Giving, Massachusetts General Hospital Development Office