



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



PGM Anywhere

The best planned giving programs use the best software
and receive the best advice.

PGM Anywhere

PGM Anywhere is the software of choice for planned giving programs throughout the U.S.

***PGM Anywhere* helps you close more planned gifts**

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

PG Calc introduced *Planned Giving Manager (PGM)* in 1985, and it quickly became the standard in gift illustration software. Since 2014, PG Calc has been developing *PGM's* web-based equivalent, *PGM Anywhere*. Today, *PGM Anywhere* is the software chosen by planned giving practitioners nationwide, giving you the power of *PGM* on any device, anywhere. Backed by our legendary customer support, *PGM Anywhere* helps your donors make the right gift.

Become a Better Gift Planner with *PGM Anywhere*

The challenge of gift planning is providing the right kind of information at each stage of the process. *PGM Anywhere* makes it easy!

- **Introduce concepts** Produce compelling diagrams and concise gift descriptions written in plain English.
- **Explore "what ifs"** Show the benefits of any planned gift using charts, graphs, or diagrams. Refine calculations in seconds. Compare your choice of gifts or gift amounts side-by-side.
- **Share in-depth analyses** Create simple or sophisticated projections that will satisfy the most demanding donor or advisor.
- **Provide closing documents** Generate documents to acknowledge a gift, establish a gift annuity agreement that meets the requirements of any state, substantiate a donor's charitable deduction, and more.
- **Receive authoritative answers to your questions** Contact our client support team by phone or email to get the expert guidance you need.

***PGM Anywhere* illustrations give your donors the confidence to make a planned gift.**

Document describing a gift annuity



WHAT IS A CHARITABLE GIFT ANNUITY?

A charitable gift annuity is a simple contract between you and Fenway School.

In exchange for your irrevocable gift of cash, securities, or other assets, Fenway School agrees to pay one or two annuitants you name a fixed sum each year for life. The older your designated annuitants are at the time of the gift, the greater the fixed amount Fenway School can agree to pay. In most cases, part of each payment is tax-free, increasing each payment's after-tax value.

Payments may be made annually, semiannually, or quarterly.

EXAMPLE:

You irrevocably transfer \$250,000 in long term appreciated property (assets you have held more than one year) with a cost basis of \$50,000 to Fenway School in exchange for a \$14,500 annuity for an annuitant, age 75.

BENEFITS INCLUDE:

- 1) You will qualify for a federal income tax deduction of approximately \$119,775. Your deduction may vary modestly depending on the timing of your gift.

Note that deductions for this and other gifts of long term appreciated property will be limited to 30% of your adjusted gross income. You may, if necessary, take unused deductions of this kind over the next five years, subject to the same 30% limitation.
- 2) You will receive fixed payments in quarterly installments totaling \$14,500 each year for life. In addition, \$2,100 of each year's payments will be tax-free for the first 12.4 years.
- 3) You will owe no tax on your capital gain at the time of your gift. Rather, \$8,398 of your annual payments from the gift annuity will be taxed as long term capital gain in each of the first 12.4 years of payments. If you were to sell and reinvest this property yourself, you would owe tax on \$200,000 of long term capital gain.
- 4) Your estate may enjoy reduced probate costs and estate taxes.
- 5) You will provide generous support to Fenway School.

Prepared for Mrs. Jane Donor

These calculations are for illustration purposes only and should not be considered legal, accounting, or other professional advice. Your actual benefits may vary depending on several factors, including the timing of your gift.

Chart comparing gift benefits



Prepared for:
Mrs. Jane Donor

Comparison of Benefits

ASSUMPTIONS:

Beneficiary Age	75
Principal Donated	\$250,000.00
Cost Basis of Property	\$50,000.00

BENEFITS:

	Charitable Gift Annuity 5.8%	Charitable Unitrust 5%
Charitable Deduction	\$119,775	\$150,700
Annual Payout	\$14,500 (fixed)	\$12,500 (variable)
Tax-free Portion	\$2,100	
Capital Gain Income	\$8,398	
Ordinary Income	\$4,002 *	

Total Reportable Gain \$104,180

* Once all tax-free portions have been distributed and all capital gain reported, the entire annuity will become ordinary income.

PGM Anywhere

PGM Anywhere gives you the power to illustrate planned gifts wherever you are, on any device.

PGM Anywhere is always at your fingertips

With *PGM Anywhere*:

- **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 appealing 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!

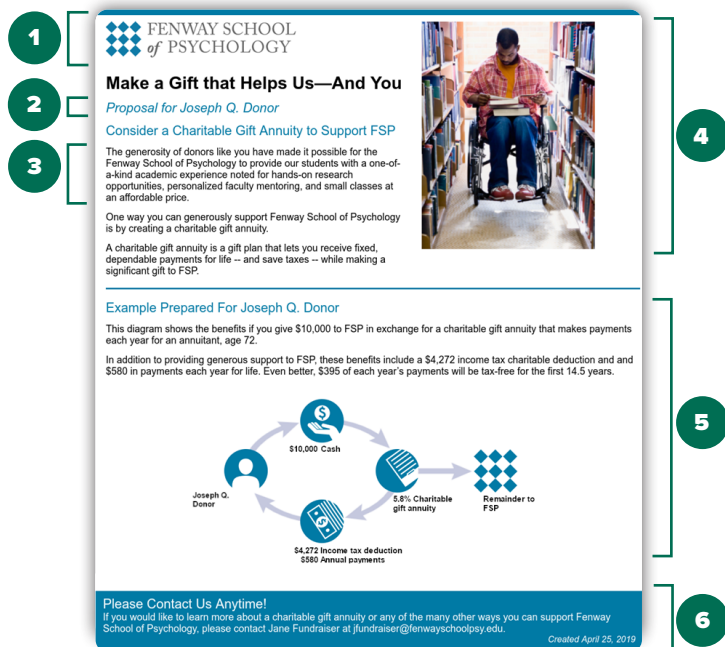
GAM Anywhere: Everything you need to explain and close gift annuities

GAM Anywhere produces all the calculations and documents you need to work with gift annuity donors, and for a lower cost than *PGM Anywhere*.

GAM Anywhere can:

- **Illustrate every common gift annuity** Show donors the benefits of an immediate, deferred, or flexible gift annuity.
- **Produce closing documents** Generate documents to explain the gift, acknowledge it, substantiate the donor's charitable deduction, and more.
- **Create gift annuity agreements** Create gift annuity agreements for donors in all 50 states and D.C.
- **Same advantages as *PGM Anywhere*** Create proposals on any device, easily collaborate with colleagues, nothing to install or update.

Designer Proposals Diagram



Customize Your Proposal's Appearance

- 1 Your charity's logo and colors
- 2 Your donor's name prominently shown
- 3 A custom paragraph (optional)
- 4 A motivating image of your choice
- 5 A personalized example that explains the benefits
- 6 Your charity's contact information

Praise for PG Calc's PGM Anywhere

“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

“Audubon has been using PGM for over a decade to send accurate gift information to hundreds of donors each year. PGM Anywhere is user-friendly and helps streamline our work even further.”

— Shari Kolding, CAP
Director of Gift Planning, National Audubon Society

“PGM Anywhere has been a great tool for my colleagues and me. We reached out to the Client Services team for a custom training. They were very helpful in coordinating the session and providing an effective training for system colleagues and me. My colleagues and I thought it was a very insightful training for the new gift opportunity they are marketing and a reminder of the services we have available through PG Calc. Kara Morin also reminded the group about the support services PG Calc offers. Thank you again for your support and an informative session!”

— Kinna N. Clark, Esq., CAP
*Senior Director of Development and Gift Planning Services,
The University of North Carolina System*