



## 2025 Monthly Webinar Topics

PG Calc Webinars bring the skill and experience of the industry's top practitioners to your home or office! PG Calc consultants and carefully selected guest presenters deliver the most up-to-date knowledge and insights on important gift planning topics. Eight Webinars will include 45 minutes of formal presentation and 15 minutes of Q & A with the presenter, and a PDF of the slides. Four additional Webinars will be FREE, as indicated below. Full details are available at [www.pgcalc.com/education/webinars](http://www.pgcalc.com/education/webinars).

Presentation Title	Presenter(s)	Date
What to Give? QCD, Cash, or Stock	Jeff Lydenberg, Bill Laskin	1/30/2025
Navigating Your AI Transformation	Nathan Chappell, <i>Donorsearch Ai</i>	2/27/2025
Why Would My Organization Want Its Own DAF Program? (FREE)	Gary Pforzheimer, Stephen Kump	3/27/2025
Top Ten Estate Problems and What to Do About Them	Andrew Fussner, <i>American Heart Association</i>	4/24/2025
Success with Life Insurance	Craig Wruck	5/29/2025
Gift Annuity Regulations and Compliance Q&A (FREE)	Edie Matulka, Julie Goldenberg Hay	6/26/2025
You're in the Will! Now What? Strategies That Lead to Larger Legacy and Lifetime Gifts	Russell James, <i>Texas Tech University</i>	7/31/2025
Planned Giving Marketing: What Works, What Doesn't, and What's Next (FREE)	Andrew Palmer	8/28/2025
Wanted, Dead or Alive: Finding Missing Beneficiaries	Morgan Heck, <i>Nonprofit Consultant</i> Kara Morin	9/25/2025
Date of Gift and Substantiation Rules Q&A (FREE)	Jeff Lydenberg, Edie Matulka	10/23/2025
Alternative Endings: Early Terminations of Planned Gifts	Jeffrey Frye, Jay Pacitti	11/20/2025
Taxation Basics for Fundraisers	Craig Wruck	12/18/2025

## 2025 Training Schedule

PG Calc offers online and in-person group training that supports you in running a successful planned giving program. Training also aids in staying current with the latest trends in planned giving. Taught by experienced PG Calc staff members, the courses are designed to provide knowledge and insights applicable to your professional responsibilities.

January	January 9 January 21, 22	When the IRS Needs Your 1099s: <i>GiftWrap</i> Steps to Filing Success – Online FREE <i>PGM Anywhere</i> and Charitable Gift Annuities – Online
February	February 5, 6	<i>PGM Anywhere</i> and Charitable Remainder Trusts – Online
March	March 5, 6 March 26, 27	Lead Trust School – Online <i>GiftWrap</i> Introductory – Online
April	April 9, 10 April 23, 24	<i>PGM Anywhere</i> and Charitable Gift Annuities – Online <i>GiftWrap</i> Advanced – Online
May	May 8	Computing FASB Liabilities with <i>GiftWrap</i> – Online
June	June 11, 12	Planned Giving by the Numbers – Online
August	August 13, 14	Gift Planning with <i>PGM Anywhere</i> Introductory and Advanced – IN PERSON (Boston, MA)
September	September 10, 11 September 23, 24	<i>PGM Anywhere</i> and Charitable Remainder Trusts – Online <i>GiftWrap</i> Introductory – Online