

# TRAINING



**PG Calc Incorporated**  
Your partner in planned giving<sup>SM</sup>



Planned giving is our business at PG Calc. You need a partner that can help you understand the highly technical concepts inherent in this area of fundraising. We stand ready to help you understand and apply the information you need to raise more planned gifts. Our training opportunities are varied and flexible. We can help you learn about gift planning and gift administration in a fashion that best suits your needs.

## **Why Take A Training Session?**

There are many good reasons to take a training session. You may be new to planned giving or new to PG Calc. You may be experienced in planned giving but want to increase the effectiveness of your presentations, wish to gain more familiarity with different gift plans, need to brush up on tax changes or compliance reporting, or need to learn best practices for gift administration. Perhaps you've added staff members to your department who would profit from training. Anyone involved with planned giving would benefit from our training sessions.

## **Our Approach**

We build our classes to suit the needs of our customers. Our sessions range in level from introductory to expert and include customized training. We use case studies to examine both simple and complex gift models. We teach you shortcuts for maneuvering within the software, as well as how to customize the software for your organization's planned giving needs.

The classroom size and location are also flexible. We offer group classes for maximum effectiveness and 1-on-1 training as a tailored, time-efficient choice. We even provide Do-It-Yourself instruction if that's your preferred method of learning.

## **Training Goals**

We teach every PG Calc class with the same training goals:

1. Demonstrate and discuss the capabilities our products offer
2. Teach fast and efficient product use and feature navigation
3. Explain the concepts behind the calculations
4. Instill gift planning and administration concepts essential for fundraising success
5. Enable your organization to close more planned gifts and steward planned gift donors

*The recent PG Calc workshop was a genuine pleasure to attend. Two very full days with instructor Jeff Lydenberg were replete with basic and more advanced "how to's", and meaningful, substantiating theory behind gift methods and illustrations. Others in attendance agreed that the high quality of PG Calc services, training, and great help given by Jeff and many others in your company are a hallmark for all planned giving service organizations.*

Garry E. Malone  
Assistant Vice President for Philanthropy and  
Alumni Affairs  
The Research Foundation of NY  
Albany, NY

## Making It Happen:

### 3 steps to gain proficiency

1. Choose your specialty area of interest
2. Select your preferred training format
3. Register

## 1. Training Specialty Areas

Our instructors bring deep technical knowledge, strong marketing backgrounds, and years of planned giving experience to each class we offer.

PG Calc provides all levels of training for development officers, gift planners, and gift administration staff to help them realize their program's maximum potential. We have three areas we specialize in and offer training for:

### Gift Planning

Gift planning is the process of bringing donors and charitable organizations together to develop mutually beneficial gift plans. PG Calc's Planned Giving Manager (PGM) and its smaller versions, Mini Manager and Gift Annuity Manager, are tools that create the most effective planned giving proposals possible. Our classroom seminars are available for all levels of users in:

- **Gift Planning with PGM-Introductory** — No prior experience needed. Learn to create illustrations for the most common planned gifts.
- **Gift Planning with PGM-Advanced** — Go beyond the basics and learn advanced planned gift techniques.
- **Gift Annuity Seminar** — Everything you need to know about deductions, taxation and gift design of this popular life income arrangement.
- **Planned Giving by the Numbers** — Learn all the details behind the computations.
- **Lead Trust School** — How to present the benefits of charitable lead trusts.

### Gift Administration

Securing planned gifts is important. But the job is not complete unless the charities' obligations to the beneficiaries are handled professionally. Stewardship is enhanced through timely and accurate gift administration. Gift administration involves all the activity sometimes called "back office." Gift Administration with GiftWrap training includes the how and why of paying beneficiaries, investment of the gift, tax reporting, reporting in accordance with Federal Accounting Standards Board (FASB) guidelines and compliance with state gift annuity reserve requirements.

- **Basics** — Key organization set-up, data integrity, security and data entry elements.
- **Reporting and Analysis** — How to generate a variety of reports including FASB liabilities reports, annuitant payments and tax forms (1099-Rs).
- **Policies and Procedures** — For administrators reviewing the management of planned gifts.

### Marketing Gifts on the Internet

Using the Internet as a vehicle for marketing is very different from traditional forms of marketing communication. Learn how to use the Internet most effectively to market your planned giving programs.

- **Internet Marketing for Gift Planners** — This workshop is designed for a non-technical audience, specifically for anyone in the development office who is responsible for marketing a planned giving program. Learn general marketing concepts and how they apply to the Internet.

## 2. Your Training Format Options

We know that the format in which you receive your training can make the difference between hearing and absorbing. PG Calc has a variety of options for you for this very reason. We offer our training in multiple formats to accommodate our customers' needs.

### Do-It-Yourself Instruction

If you want to control the time of your training, both in pace and time of day, consider our "Do-It-Yourself" training. We provide you with the tools you will need to get up and running in the area where you most need help.

### Software Orientation — Free

Did you know you can get a FREE PG Calc introductory orientation just because your organization owns the software? It's true. The introductory orientation is available regardless of when the product was purchased. We want all our PG Calc software users to have this foundation so they are effective in their roles. If you have not yet taken advantage of this free introductory orientation, simply contact [support@pgcalc.com](mailto:support@pgcalc.com) to schedule.

### Group Training Seminars

Our hands-on group sessions feature the case study method so you learn gift planning while becoming familiar with your software's full capabilities. You'll learn techniques, hints and shortcuts to increase your efficiency as well as your understanding of planned giving concepts. And, most important, you'll learn how to create powerful gift proposals that motivate your donors. Both Introductory and Advanced sessions are available.

Visit our training seminar calendar online at [www.pgcalc.com/training](http://www.pgcalc.com/training). Find the training seminar closest to your office. Better yet, if you have plans to attend a conference, keep an eye out for our special Conference Dates.

### On-site Custom Training

Get the answers that matter for your organization. Get them on-site and

presented to as many users as you need trained to realize cost savings. We work with you to create customized classes that fit your planned giving needs using your PG Calc resources, and we deliver these classes on-site at your office.

### Training at PG Calc's Office

Come visit us in Cambridge and get your training at PG Calc's home base. We offer customized training as well as our standard seminars.

### Distance Learning

Customized training is available online. All you need is an internet connection and a speaker phone to spend a few hours with a live instructor without leaving your office. Content is tailored to your needs.

*Excellent! Honestly, I thought it was the best type of seminar I attended in the past three years. It scratched where I was itching and it answered many questions and concerns. Jeff and Frank were a good team and well balanced.*

Mark R. Seeley  
Vice President for Planned Giving  
Reformed Theological Seminary  
Charlotte, NC

## 3. Register

**Sign up for your training today.**

For group training seminars, register online at [www.pgcalc.com/training](http://www.pgcalc.com/training). Current seminar schedules, logistics, pricing and registration are all available online.

To schedule your FREE software orientation or any customized training, e-mail us at [training@pgcalc.com](mailto:training@pgcalc.com) or call Client Support directly at 1-888-4PG-CALC.

Visit [www.pgcalc.com/training](http://www.pgcalc.com/training) or call 888-474-2252

Call 888-497-4970 for all the details.

## PG Calc is not just software!

Did you know that PG Calc offers many services as well? From meeting with donors to state regulations compliance for gift annuity programs, PG Calc can help.

	Program Planning	Gift Planning	Gift Administration
<b>Products</b>	Gift Annuity Resource Manual — <i>Print and electronic versions</i>	Software — <i>Planned Giving Manager (PGM)</i> — <i>Mini Manager</i> — <i>Gift Annuity Manager</i>  Web calculator — <i>GiftCalcs</i>	Software — <i>GiftWrap</i> — <i>Pooled Fund Organizer</i>
<b>Services &amp; Consulting</b>	Establishment of new programs Presentations for Board and staff CGA state registration compliance CGA risk analysis Web site assessments Assessment of existing programs	Gift design and illustrations Appraisals of income interests Cross-border giving Ongoing gift planning support	Gift Administration Services Compliance Reporting — <i>FASB liability reports</i> — <i>CGA actuarial reserves</i> — <i>CGA annual filing</i> Ongoing gift administration support
<b>Training</b>	Board and staff training Gift Annuity Seminar Internet Marketing for Gift Planners	Gift Planning with PGM Lead Trust School Planned Giving by the Numbers	Basics with GiftWrap Reporting and Analysis Policies and Procedures



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