


PG Calc | Your Partner In Planned Giving Success

Julia Boerth, Director of Gift Administration

IT TAKES TWO TO TANGO:
HOW TO SECURE MORE PLANNED GIFTS WITH A
WELL CHOREOGRAPHED DANCE




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Our Agenda Today

- Repeat Gifts
- Gift Planning Cycle
- Who are the Dancers?
- Case Study



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Repeat Gifts

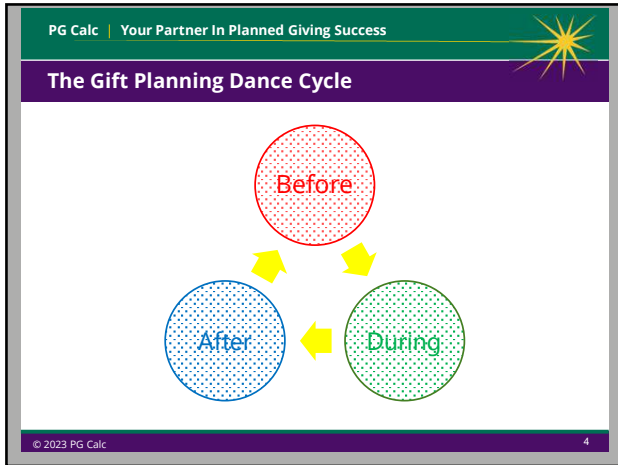
% of Gift Annuities in Last Year from Donors Who
Previously Contributed a Gift Annuity to Your Charity

	2021	2017	2013
0%	14%	21%	21%
1-25%	6%	11%	9%
26-50%	35%	24%	31%
51-75%	21%	22%	22%
76-100%	24%	22%	17%
Mean	51%	47%	44%
Median	50%	50%	49%

Source: American Council on Gift Annuities, 2021 Survey of Charitable Gift Annuities

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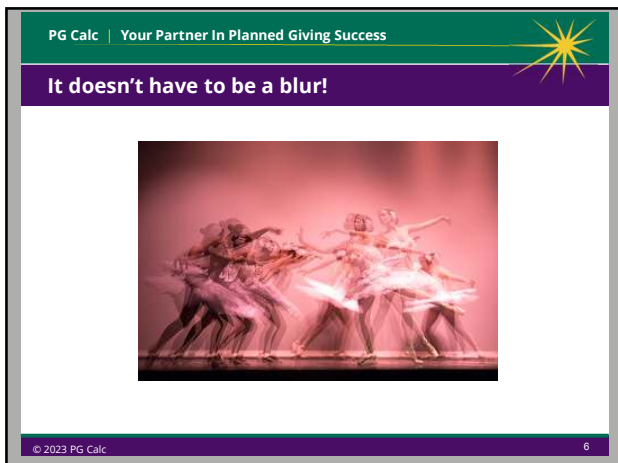
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Your Organization

Planned Gifts: Roles and Responsibilities

	Before	During	After
Gift Planner			
Treasurer/CFO			
Capital/Investment Manager			
Administrator			
Donor			
Notes			

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Role of Gift Planner

- Choreographer
- Marketing
- Ticket Agent
- Stage Manager
- Usher
- Facilities

Gift Planner

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Role of Treasurer/CFO

- Policies
- Deposits
- Segregated Accounts
- Valuations
- Compliance
- Communicate, *regularly*

Treasurer/
CFO

Gift Planner

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Role of Investment Manager/Custodian/Trustee

- Policies
- Investment Objectives
- Compliance
- Deposits
- Disbursements

Gift Planner

Custodian/
Investment Mgr/
Trustee

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Role of Administrator

- Policies
- Compliance
- Valuations
- Database & Recordkeeping
- \$ Distributions
- Tax Forms
- Customer Service

Gift Planner

Administrator

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Role of Donor


- Goals
- Policies
- Information
- On-going communication

Donor

Gift Planner

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Case Study

Can you answer these questions?

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Plan, Practice, Perfect

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PLANNED GIVING COUNCIL OF GREATER PHILADELPHIA

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