

Planned Gift Calculators

WHAT IS IT?

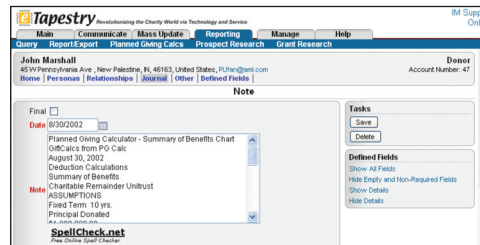
Need calculations for a possible “planned gift”?

eTapestry has integrated online calculation tools from the leaders in planned giving software. Choose from PG Calc™ or Crescendo Interactive™ for fast, accurate, up-to-date, online planned gift calculations. Both products have been integrated with eTapestry to allow you to easily run a planned gift calculation right from within a donor’s journal record. The details of that calculation are then automatically transferred to a donor’s contact record where they can be reviewed and referenced as needed.

HOW DOES IT WORK?

eTapestry’s Planned Gift Calculators are accessed from within your eTapestry database. You simply fill in the details of the appropriate planned gift, and the calculation is done – using the latest rates, tables, and techniques.

GiftCalcs from PG Calc		Wednesday, June 21, 2006
Deduction Calculations		
Summary of Benefits		
Charitable Remainder Unitrust		
ASSUMPTIONS		
Beneficiary Age(s)	67, 68	
Principal Donated	\$6,000.00	
Gift Date	6/21/2006	
Payout Rate	5 %	
Payout Schedule	Quarterly Beginning	
BENEFITS		
Charitable Deduction	\$2,300.10	
First Year's Income	\$300.00	
<small>(Future income will vary with trust value)</small>		
<small>If you are contributing short-term gain or other ordinary income property, your deduction may be reduced</small>		
Prepared for John Marshall	IRS Discount Rate is 6 %	
<small>These calculations are estimates of gift benefits; your actual benefits may vary</small>		



The details of the gift are calculated online (left), and the information automatically inserted into the donor’s record where it can be queried and reported on (above).

These tools offer flexible calculation of all charitable planned gift types. Choose from a number of planned gift options: Charitable Remainder Unitrust (CRUT), Charitable Remainder Annuity Trust (CRAT), Charitable Lead Unitrust (CLUT), Charitable Lead Annuity Trust (CLAT), Pooled Income Fund (PIF), and Charitable Giving Annuity (CGA). All information, including changing rates and schedules, are automatically updated for you.

SUMMARY

Get integrated online planned gift calculators from the leaders in planned gift software. Choose from either PG Calc™ or Crescendo Interactive™. Both provide outstanding solutions for the planned gift and development professional needing easy-to-use, advanced calculators.

The GiftCalcs tool from PG Calc™ is \$25 per month and includes all updates. The Crescendo Online tool is free to current Crescendo™ software users or \$300 per year for new users.



eTapestry is proud to be a partner with PG Calc and Crescendo Interactive.



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