

Planned Giving Resources

Tactical and Strategic Planning for CEO and Nonprofit Development

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Planned Giving Resources is a full-service Charitable Gift Planning company. We focus exclusively on delivering planned giving and charitable Gift Annuity administration and management services. Our commitment to client service coupled with our expertise uniquely positions us to manage and administer your institution's planned giving program. For more information visit our website: www.pgresources.com.

PGResources provides the vital services organizations need to reduce overhead and ensure compliance with all state and federal regulations.

Our six administrative services ensure governance and monitoring requisites for the timely transmission of annuity payments and the accurate submission of state reports.

PGR professionals have the experience to implement systems and processes developed during more than 20 years of service to our clients.

EXPERIENCED ADMINISTRATIVE PARTNERS

Gift Administration

Charitable
Gift
Annuity
Administration

The PGResources team will partner with your staff to provide efficient administrative services:

- ◆ Assess the suitability of potential gifts offered for contracts issued;
- ◆ Assist you to liquidate assets as necessary;
- ◆ Determine the value of gifts donated to your plan;
- ◆ Ensure that all necessary information has been supplied to initiate payments;
- ◆ Calculate, if desired, the charitable income tax deduction applicable to any current or deferred gift annuity contract.

Charitable Gift
Annuity Policies
and
Procedures

Accounting and Recordkeeping

Identify Federal
Tax Regulation
and
Submit Forms

PGResources' professionals implement PGR's **SNAP** model to review charitable gifts:

- ◆ Verify that each gift pool complies with state reserve requirements;
- ◆ Track and report on gift annuity remainder values;
- ◆ Provide financial and planned giving staff periodic account statements and compliance reports on gift annuity assets
- ◆ Generate all required liability statement in keeping with FASB 116 and 117 reports.

State
Registrations
Annual Reports
Compliance
Oversight

Tax Reporting / Regulation Monitoring

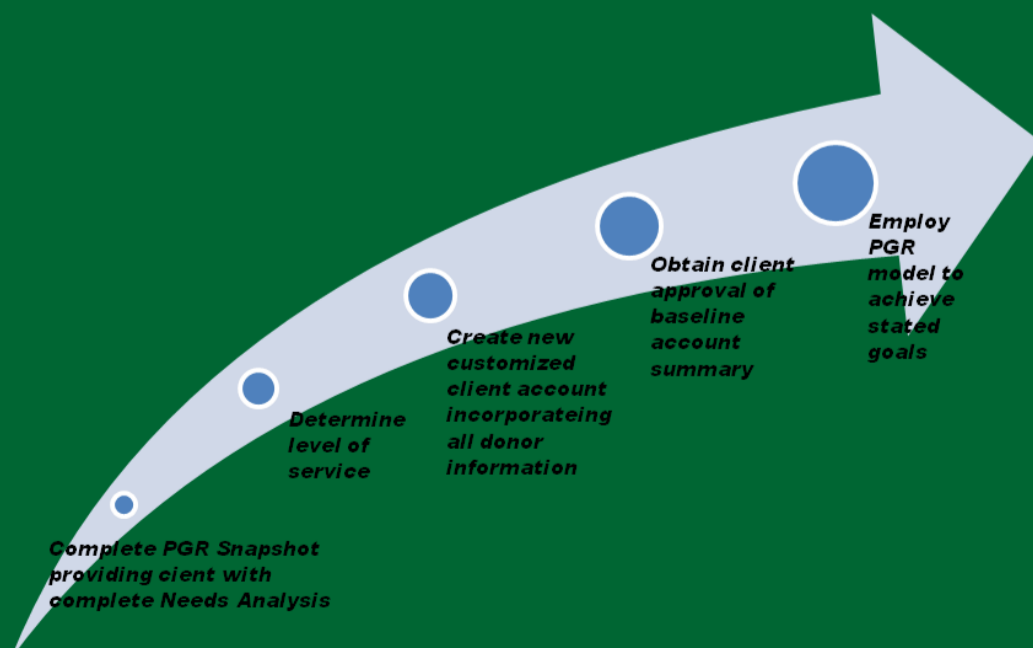
Established
Program
Analysis,
Assessment and
Audit

The PGResources comprehensive process includes:

- ◆ Preparing and distributing all required IRS forms including electronic transmission of the 1096 and mailing of 1099-Rs to all annuitants in a timely fashion.
- ◆ Monitor all state annuity regulations and reporting requirements providing clients with all changes affecting their programs.

Prospecting
Gift Design
and
Gift Closing

PGR's **SNAP** model



Inquiries are always welcome!

We are glad to share our expertise and offer resources to address unique situations.

Call 732 894 3477 or send to note to James Hohn james@hohnresources.com