

# The Raiser's Edge™

Planned Gift Tracking Guide

## **020112**

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# What Is In This Guide?



In the *Planned Gift Tracking Guide*, you learn about planned giving vehicle types and how to add, edit, and delete planned gift records (when you have the optional module PlannedGiftTracker). For further information about *PlannedGiftTracker*, see the following.

- “Frequently Used Terms” on page 3
- “Understand the Planned Gift Record” on page 9
- “Track Planned Gifts” on page 25

## How Do I Use These Guides?

**The Raiser’s Edge** user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the **Raiser’s Edge** documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about **The Raiser’s Edge** by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

# Planned Gift Tracking

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With the optional module *PlannedGiftTracker*, you can create gift records for your organization's planned giving, including information specific to numerous types of planned gift vehicles. You can record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of multiple beneficiaries and relationships for a planned gift. In addition, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets.

**Note:** You may have previously added planned gifts in *The Raiser's Edge* as Other gift records using Gift attributes, Gift subtypes, or Gift codes. If so, you can use the Planned Gifts Migration Tool to migrate these gifts to records with a gift type of Planned Gift. For more information about this tool, see Appendix A in this guide.

Because information concerning planned gifts can be very sensitive, *PlannedGiftTracker* includes security settings so you can restrict access to this information based on security groups. Users without rights to *PlannedGiftTracker* cannot enter or view gift information or generate reports for planned gifts. For more information about the planned gifts security options, see the *Configuration & Security Guide*.

In addition, *PlannedGiftTracker* includes two reports, allowing authorized users to view and print gift information. These reports incorporate a Columns tab that provides greater flexibility to select and organize the information to appear. For more information about these reports, see the *Reports Guide* and *Sample Reports Guide*.

## Frequently Used Terms

This section defines words and phrases you need to know as you work with planned giving. If you come across an unfamiliar term when you read this or any chapter in *The Raiser's Edge* documentation, check the online glossary in the help file.

**Bequest.** A bequest planned gift is the most basic form of a planned gift. It includes a donor transfer of assets to a recipient(s) upon a donor's passing.

**Discount Rate Percent.** The IRS determines (and values each month) the discount rate percent. The discount rate percent is an estimate of the annual rate of return on invested gift assets, used to help determine charitable deductions applicable for some types of planned gifts.

**Expected Maturity Year.** Expected maturity year is the year in which it is estimated that all conditions for the planned gift are met and the balance of the gift is allocated to the final recipient. This may be the year the last beneficiary is estimated to pass away, it may be based on a fixed time period, or it may be stated by another way the terms of the gift vehicle dictates. *The Raiser's Edge* does not calculate the expected maturity year. You enter the expected maturity year in the **Expected maturity year** field on the Gift tab of the planned gift record.

**Flexible Deferred.** Flexible deferred planned gifts apply to gift annuities only. With a flexible deferred planned gift, payments can be deferred for a period of time selected by the donor.

**Gift Annuity.** A gift annuity gives assets to an organization from a donor. In exchange, the organization agrees to pay specified beneficiaries a fixed amount of money each year for life. The organization can pay the beneficiary in installments. When the last beneficiary passes away, the remainder of the annuity belongs to the organization.

**Gift has been realized.** Once all scheduled payments from the planned gift are made and the final balance of the gift is allocated to the final recipient(s), mark **Gift has been realized** on the Gift tab of the Planned Gift record. When you mark this checkbox, you indicate the gift has fully matured. In *Reports*, you can filter planned giving reports based on the **Gift has been realized** checkbox. For more information about planned giving reports, see the *Reports Guide* and the *Sample Reports Guide*.

**Lead Annuity Trust.** A lead annuity trust is similar to a remainder annuity trust. The exception is that a lead annuity trust's payments are made to the organization instead of the beneficiaries. When the trust term ends, the remainder of the assets are returned to the donor, rather than the organization.

**Lead Unitrust.** Identical to a lead annuity trust, except the lead unitrust payments to the organization are based on a fixed percentage of the trust's value (to be valued again annually), rather than a fixed amount of money for each payment.

**Life Insurance.** A constituent may have a life insurance policy that no longer fits the needs of his family and may decide to donate the life insurance policy to your organization. Add a gift of life insurance as a planned gift with a vehicle of Life Insurance.

**Pooled Income Fund.** The organization establishes the Pooled Income Funds (PIF). With a PIF, gifts from several donors are pooled into a fund (not a *Raiser's Edge* fund). A donor specifies the PIF to which his gift is invested and is assigned a number of units. Units are based on the proportion of that fund's total amount that the gift represents. On a quarterly schedule, investment earnings from the fund are paid, proportionally based on the number of units, to the designated beneficiaries of each of the fund's contributors. When the last designated beneficiary for each donor's gift passes away, that donor's proportional share of the current total is removed from the fund and distributed to the organization.

**Remainder Annuity Trust.** A remainder annuity trust is similar to a gift annuity, except the assets are set up in a trust. A third party trustee (in some circumstances, your organization) invests and manages the trust. The term of the trust may be defined as a specific period of years or may last the lifetimes of the beneficiaries. When the trust term ends, the remainder of the assets goes to the organization.

**Remainder Unitrust.** Identical to a remainder annuity trust, except the remainder unitrust payments to the beneficiaries are based on a fixed percentage of the trust's value (to be valued again annually), rather than a fixed amount of money for each payment.

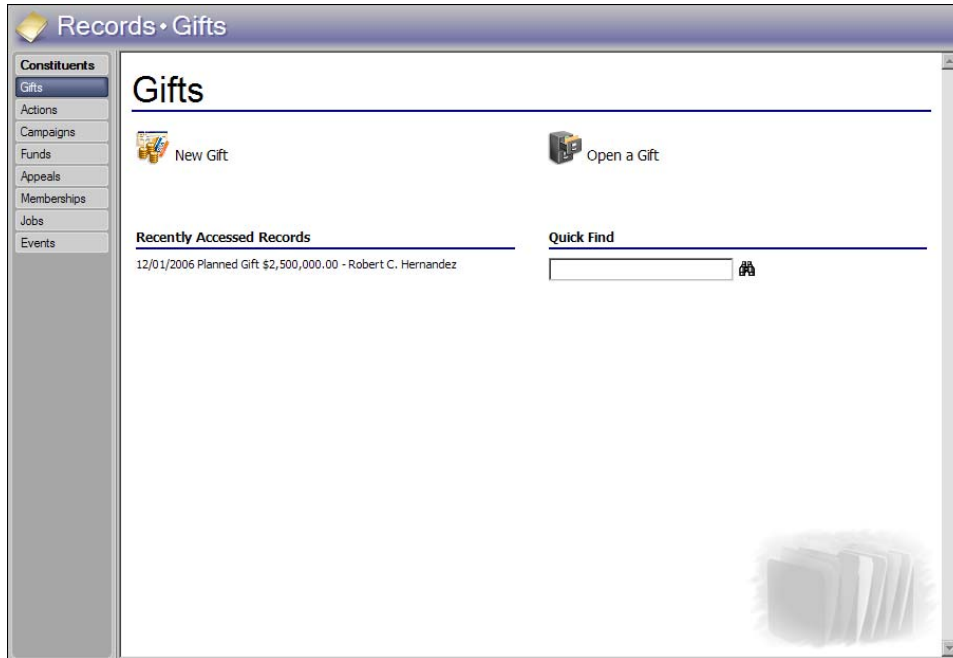
**Retained Life Estate.** Through a retained life estate, a donor gives a home to an organization but retains the right to use the house for a specified period of years or for life. The donor may specify a beneficiary who may use the house after the donor's death. When the specified period ends, the home goes to the organization.

**Vehicle.** The gift vehicle is the specific type of a planned gift that defines how the gift conditions are structured. These are based on generally accepted legal instruments for transferring a planned gift to an organization. Gift vehicles are constantly changing as applicable tax laws are amended and attorneys and financial planners devise new vehicles. The **Vehicle** field is located on the Gift tab of a gift record.



# Navigate in Planned Giving

From the Gifts page, you can create a new gift record for the gift type of Planned Gift. You can also open existing gift records from this page. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



The Gifts page also contains a list of recently accessed records. To open any gift record in this list, click the gift description. To quickly find a gift donated by a constituent, enter the constituent name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

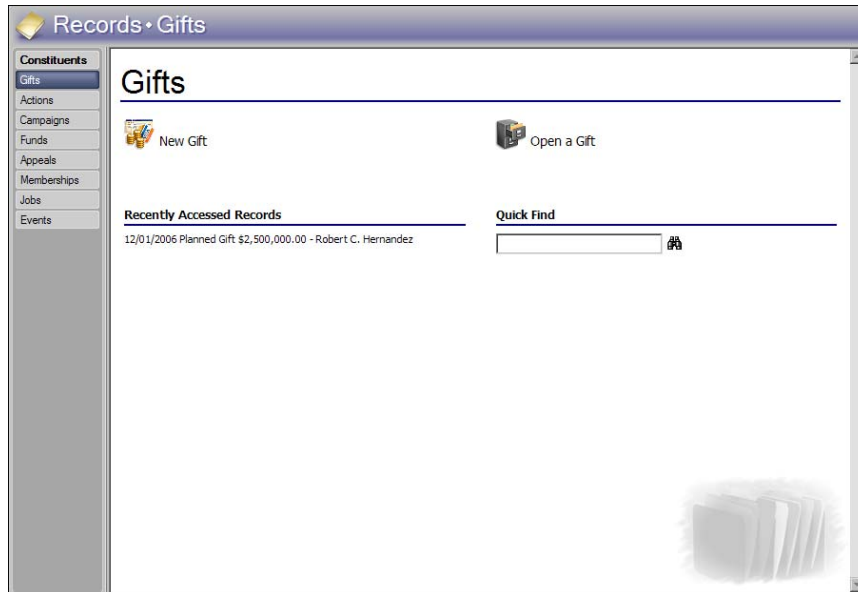
## Access a Planned Gift Record

After you create a planned gift, you can open the planned gift record from the Gifts tab of the constituent record. You can also open an existing planned gift record from the Records page. This section explains how to open a planned gift from the Records page. For more information about opening gifts displayed on the Gifts tab of a constituent record, see “Edit a planned gift record for a mature planned gift” on page 43.

### ► Open an existing planned gift from the Records page

1. On the Raiser's Edge bar, click **Records**.

- Click the **Gifts** link. The Gifts page appears.



- Click **Open a Gift**. The Open screen appears so you can search for the gift record to open.

- In the **Type** field, select “Planned Gift.”

**Note:** If you do not know the correct spelling or number, you can enter the first few letters or characters in the criteria fields in **Find Gifts that meet these criteria** frame. For detailed information about how to use these fields, see the *Program Basics Guide*.

- In the **Find Gifts that meet these criteria** frame, enter the other criteria to use to search for the planned gift. You can search by an individual’s first or last name, organization name, constituent ID, and Social Security Number.

**Warning:** We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all the criteria you enter. Too much criteria information in the **Find Gifts that meet these criteria** frame can actually prevent you from finding a gift.

- Click **Find Now**. If the search criteria entered matches a gift in the database, the gift appears in the grid. If the criteria entered matches multiple gifts, multiple gifts may appear.

The screenshot shows the 'Open' window with the following components:

- Find:** A dropdown menu set to 'Gift'.
- Search using query:** A text field containing '<Default>'.
- Grid:** A table with columns: Constituent Name, Gift Date, Gift Type, Gift Amount, and a fifth column (likely Name/Title). The first row is highlighted.
 

Constituent Name	Gift Date	Gift Type	Gift Amount	
Mark D. Adamson	11/11/2006	Planned Gift	\$1,200,000.00	Annabe
Lucy G. Avdeenko	05/03/2006	Planned Gift	\$200,000.00	Annabe
Francis E. Baker	12/01/2005	Planned Gift	\$1,000,000.00	Preside
Agnes M. Cone	01/02/2007	Planned Gift	\$1,500,000.00	Science
Clara M. Daniels	12/01/2005	Planned Gift	\$200,000.00	Camp K
Robert C. Hernandez	12/01/2006	Planned Gift	\$2,500,000.00	Preside
Dean P. Isley	01/02/2006	Planned Gift	\$800,000.00	Gift Anr
Phillip B. Keller	06/28/2006	Planned Gift	\$100,000.00	Acquisit
Marie McFarland	10/25/2007	Planned Gift	\$1,000,000.00	Comput
Mohammed Rahman	12/01/2005	Planned Gift	\$500,000.00	Camp K
- Find Gifts that meet these criteria:**
  - Last/Org name:** A dropdown menu.
  - First name:** A dropdown menu.
  - Constituent ID:** A dropdown menu.
  - SSN:** A dropdown menu.
  - Type:** A dropdown menu set to 'Planned Gift'.
  - Checkboxes:**
    - ☒ Display inactive constituents
    - ☐ Display deceased constituents
    - ☐ Check spouse name
    - ☐ Check aliases
    - ☐ Exact match only
    - ☐ Check nickname
- Buttons:** Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results.
- Status:** 16 records found.

- In the grid, select the gift record to open.

All the fields, checkboxes, and buttons on the Open screen are discussed in detail in the *Program Basics Guide*.

8. Click **Open**. The gift record appears.

The screenshot shows a software window titled "Gift for Mark D. Adamson". The window has a menu bar with "File", "Edit", "View", "Gift", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with various icons, including "Save and Close". A tabbed interface is visible with tabs for "Gift", "Miscellaneous", "Planned Gift", "Soft Credit", "Matching Gifts", "Tribute", "Attributes", "Realized Revenue", and "Split Gift". The "Gift" tab is selected. The form contains the following fields and values:

- Constituent: Mark Adamson ID: 3
- Gift type: Planned Gift
- Gift subtype: (empty)
- Gift date: 11/11/2006
- Amount: \$1,200,000.00
- Campaign: Planned Giving Campaign
- Fund: Annabelle Johnson Endowment
- Appeal: Planned Giving Letter
- Package: (empty)
- Solicitors: Audrey Lorenz
- Vehicle: Retained Life Estate
- Gift status: Active
- Reference: (empty)
- Acknowledge: Acknowledged
- Letter: ☒ Letter
- Personalized Tha: (empty)
- Benefits: (empty)
- Receipt: Not Received
- Receipt amt/no.: \$1,200,000.00
- Remainder value/as of: \$1,650,000.00 02/11/2007
- NPV/as of: \$0.00
- Expected maturity year: 2033
- Assets: (empty)
- Revocable: ☐ Revocable
- Gift has been realized: ☐ Gift has been realized
- Date added: 12/01/2004

9. After you enter or edit the appropriate information, click **Save and Close** on the toolbar.

# Understand the Planned Gift Record

When you add a planned gift, you create a gift record with the gift type of Planned Gift. To add a planned gift, select “Planned Gift” in the **Gift type** field on the Gift tab. The New Gift screen appears with planned gift fields.

## Gift Tab

Basic gift data entry applies to the majority of the Gift tab. For more information about gift data entry, see the *Gift Records Guide*. The **Remainder value/as of** and **NPV/as of** fields are specific planned giving data entry fields. Additionally, the bottom section of the Gift tab contains planned giving data.

**Note:** *The Raiser's Edge* does not calculate the estimated remainder value or NPV amounts. We recommend you calculate these amounts in a third party software and enter them on the planned gift record.

We recommend the amount in the **Remainder value** field reflect the expected income amount for your organization once all the conditions for a planned gift are met. In the **as of** date field, enter the last date the remainder value amount was updated.

If your organization prefers to track the net present value of the planned gift (what the gift is worth “today” when it matures), enter the value in the **NPV** field. In the **as of** date field, enter the last date the net present value was updated.

In the **Vehicle** field, select a planned gift vehicle. The planned gift vehicle options are Bequest, Gift Annuity, Remainder Annuity Trust, Lead Annuity Trust, Remainder Unitrust, Lead Unitrust, Pooled Income Fund, Retained Life Estate, Other Planned Gift, and Life Insurance. On the Gift tab, in addition to the planned gift vehicle, you can also track the planned gift status, the expected maturity year, assets, and whether the planned gift is revocable or has been realized.

To acknowledge your donor for a planned gift, you can print the gift vehicle information from the planned gift record in a Donor Acknowledgement Letter or Honor/Memorial Acknowledgement Letter (when you have the optional module *Honor/Memorial Tracking*). For more information about how to process the Donor Acknowledgement Letter or Honor/Memorial Acknowledgement Letter mail task, see the *Mail Guide*.

## Miscellaneous Tab

**Warning:** *The Raiser's Edge* does not currently support posting planned gift records to *The Financial Edge* or any other accounting software.

On the Miscellaneous tab, you can record information such as gift ID, constituent code, and gift code for the planned gift. You can also record any notes or direct marketing information required for your planned gift.

**New Gift for Theresa M. Vazquez**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Gift ID: 45459 GL post status: Not Posted

Gift code: Delivered gift in person GL post date: 03/03/2008

Constituency: Marketing source code:

☐ Gift is anonymous Mailing ID:

Finder number:

New Notepad Open Delete... Notepad types: <All Notepad Types>

Type	Date	Description	Notes
Planned Giving	03/03/2008	It took Marianne 18 mon...	

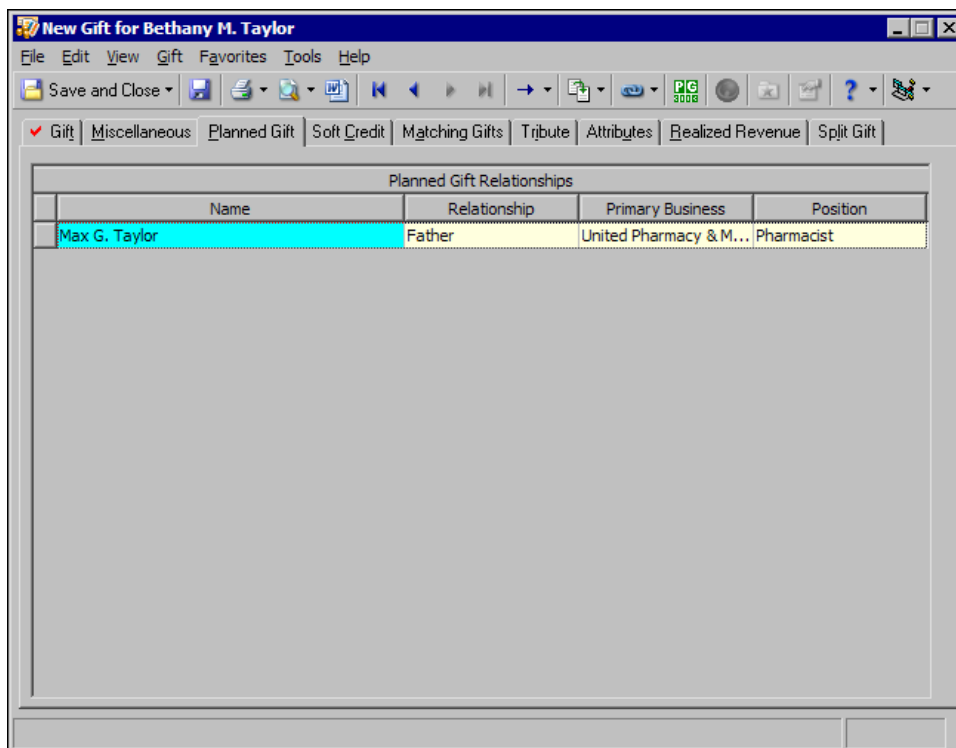
## Planned Gift Tab

The options and fields that appear on the Planned Gift tab depend on the planned gift vehicle selected in the **Vehicle** field on the Gift tab. For example, the Planned Gift tab for a Bequest gift vehicle tracks planned gift relationship information for bequests only. The Planned Gift tab for a Gift Annuity gift vehicle tracks information such as payment frequency, beneficiaries, and planned gift relationship information for gift annuities. The options and fields that appear on the Planned Gift tab apply to the nature of each planned gift vehicle.

### Vehicle: Bequest

A bequest is the most basic form of a planned gift. After the death of a donor, assets transfer to the recipient at the donor's request. Other than the recipient organization, beneficiaries do not exist for a bequest.

Therefore, the Planned Gift tab on a bequest planned gift record tracks only planned gift relationships. You can use this tab to track the relationships to the gift, such as financial advisors, attorneys, or insurance agents. You can also delete unwanted planned giving relationships on this tab.



### Vehicle: Gift Annuity

With a gift annuity, a donor gives specified assets to an organization. In exchange, the organization agrees to pay specified beneficiaries a fixed amount of money each year for life. You can schedule payments to the beneficiary in regular installments. When the last beneficiary passes away, the remainder of the annuity belongs to the organization.

The Planned Gift tab for a gift annuity tracks the payout percent and amount, the payment frequency, whether the gift annuity is flexible deferred, the starting payment date, the discount rate percent, the beneficiaries, and the planned gift relationships.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close Print Copy Paste Undo Redo PG 2008

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Payout % / amount: 25.000 \$10,000.00 Discount rate %: 5.000

Payment frequency: Annually ☐ Flexible deferred

First payment date: 03/03/2008

☐ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type

Planned Gift Relationships			
Name	Relationship	Primary Business	Position

## Vehicle: Lead Annuity Trust or Remainder Annuity Trust

A lead annuity trust pays installments to an organization, rather than beneficiaries, at the donor's request. When the trust term ends, the remainder of the assets return to the donor rather than the organization.

A remainder annuity trust places assets in a trust, which a third party trustee invests and manages. The term of the trust can last a specific period of years or for the lifetimes of the beneficiaries. When the trust term ends, the remainder of the assets goes to the organization.



The Planned Gift tab for a lead annuity trust and a remainder annuity trust is the same. For these vehicles, the Planned Gift tab tracks the payout percent, amount, payment frequency, first payment date, discount rate percent, term type, term end date, trust tax ID number, beneficiaries, and planned gift relationship information.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Payout % / amount: 25.000 \$10,000.00 Discount rate %: 5.000

Payment frequency: Quarterly Term type: Fixed Term

First payment date: 03/03/2008 Term end date: 03/03/2016

Trust tax ID number: 464897-848

☒ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type
Bethany M. Taylor	Self	23	
Boston University	Education/School		

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Boston University	Education/School		

## Vehicle: Lead Unitrust or Remainder Unitrust

A lead unitrust planned gift is identical to a lead annuity trust, except payments to the organization are based on a fixed percentage of the trust's value, rather than a fixed amount of money for each payment.

A remainder unitrust planned gift is identical to a remainder annuity trust, except payments to the beneficiaries are based on a fixed percentage of the trust's value, rather than a fixed amount of money for each payment.

The Planned Gift tab for a lead unitrust and a remainder unitrust is the same. The Planned Gift tab tracks the payout percent, payment frequency, first payment date, discount rate percent, term type, term end date, trust tax ID number, beneficiaries, and planned gift relationship information.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Payout %: 25.000 Discount rate %: 5.000

Payment frequency: Quarterly Term type: Fixed Term

First payment date: 03/03/2008 Term end date: 03/03/2016

Trust tax ID number: 464897-848

☒ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type
Bethany M. Taylor	Self	23	
Boston University	Education/School		

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Boston University	Education/School		

## Vehicle: Pooled Income Fund

The organization establishes Pooled Income Funds (PIFs). PIFs consist of gifts from several donors pooled into a fund (not a *Raiser's Edge* fund). The donor selects the PIF in which to invest his gift. The donor is then assigned a number of units based on the proportion of the fund's total amount their gift represents. On a quarterly schedule, investment earnings from the fund are paid, based on the number of units, to the designated beneficiaries. When the last beneficiary for each donor's gift dies, the donor's share of the current overall fund total is removed from the fund and donated to the organization.

**Note:** The amount in the **PIF%** field is calculated automatically. This amount is the value entered in the **Number of units** field divided by the value entered in the **Total units in PIF** field.

The Planned Gift tab for a PIF tracks the name of the PIF, payment frequency, first payment date, number of units, total number of units, beneficiaries, and planned gift relationship information.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

PIF name: Gramercy Fund Number of units: 50

Payment frequency: Monthly Total units in PIF: 200

First payment date: 03/03/2008 PIF %: 25

☒ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type
Bethany M. Taylor	Self	23	
Max G. Taylor	Father	67	

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Max G. Taylor	Father	United Pharmacy & M...	Pharmacist

## Vehicle: Retained Life Estate

Through a retained life estate, a donor gives a home to an organization but can live in or use the house for a specified period of years or for life. The donor can also specify a beneficiary who may use the house after the death of the donor. When the specified period ends or the last beneficiary dies, the home goes to the organization.

The Planned Gift tab for a retained life estate tracks the discount rate percent, term type, term end date, address of the house, beneficiaries, and planned gift relationship information.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Discount rate %: 5.000 Address block: 89901 Treybrook  
Richmond, VA 23230 Address List...

Term type: Fixed Term

Term end date:

☐ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type
Boston University	Education/School		

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Max G. Taylor	Father	United Pharmacy & M...	Pharmacist

**Vehicle: Other Planned Gift**

Your organization may receive a planned gift that is not one of the available planned gift record vehicle types, such as a bargain sale (the sale of a property for an amount that is significantly lower than fair market value). When this happens, select “Other Planned Gift” for the planned gift vehicle type.

The Planned Gift tab for Other Planned Gifts tracks the payout percent and amount, payment frequency, first payment date, beneficiaries, and planned gift relationship information.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous **Planned Gift** Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Payout % / amount: 25,000 \$10,000.00

Payment frequency: Monthly

First payment date: 03/03/2008

☒ Constituent is a beneficiary

Beneficiaries			
Name	Relationship	Age	Type
Bethany M. Taylor	Self	23	
Boston University	Education/School		

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Boston University	Education/School		

# Vehicle: Life Insurance

Your organization may receive a gift of life insurance from a constituent. The Planned Gift tab for life insurance tracks important life insurance information such as insurance carrier, premium amount, policy number, type, and face amount. You can also track whether the constituent is the policy owner and pays the premium. If your organization pays the premium, you can establish its payment schedule. In addition, you can track beneficiary and planned gift relationship information on this tab.

**New Gift for Bethany M. Taylor**

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous Planned Gift Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

☒ Constituent is the policyowner ☐ Constituent pays premium ☐ Premium is fully paid-up

Insurance carrier: Atlantic Life Insurance Policy face amount: \$100,000.00

Policy number: \*\*\*\*\*68 Premium amount: \$10,000.00 Schedule

Policy type: Term

Beneficiaries			
Name	Relationship	Age	Type
Bethany M. Taylor	Self	23	
Max G. Taylor	Father	67	

Planned Gift Relationships			
Name	Relationship	Primary Business	Position
Max G. Taylor	Father	United Pharmacy & M...	Pharmacist

If the constituent is the policy owner, mark **Constituent is the policyowner**. If your organization does not pay the premium and the constituent is responsible for paying, mark **Constituent pays premium**. If the premium is paid for, mark **Premium is fully paid-up**. If **Constituent pays premium** or **Premium is fully paid-up** is marked, the **Schedule** button, used to schedule the premium installments, is disabled.

**Note:** If the constituent has paid the premium, mark **Premium is fully paid-up**. If your organization pays the premium, mark this checkbox when the premium has been paid.

If your organization pays the premium, you can establish the installment schedule for premium payments. To do this, click **Schedule**. The Premium Schedule screen appears.

Premium Schedule for Bethany M. Taylor

Use the 'Schedule' fields, then select 'Preview' to view the premium schedule.

Premium Schedule

Premium Amount: \$10,000.00

Frequency: Annually

On: February 15

Starting on: 02/14/2008 Ending on:

Premiums due annually on February 15th

Date	Amount
02/15/2008	\$10,000.
02/15/2009	\$10,000.
02/15/2010	\$10,000.
02/15/2011	\$10,000.

Preview

OK Cancel

**Note:** The Premium Schedule screen is for reference purposes for premium payment dates. *The Raiser's Edge* does not generate payment reminders or reconcile payments.

On the Premium Schedule screen, you create a premium installment schedule. You select the frequency, payment date, and duration of the premium installments. To automatically generate the premium installment schedule, click **Preview**. To save your changes, click **OK**.

The remaining fields on the Planned Gift tab for a life insurance planned gift are data entry fields for tracking purposes. Use these fields to store details about the life insurance policy such as the insurance carrier and policy information. For security purposes, the life insurance policy number is masked and encrypted in the database. If you see asterisks in this field, you do not have rights to view the data. For more information, consult your System Administrator.

## Soft Credit Tab

A soft credit allows multiple constituents to share credit for a single gift. When you soft credit constituents for a gift, you can decide whether to split the credit evenly between all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution.

You can soft credit as many constituents as necessary, as long as each soft credit recipient is a constituent in the database. When you create reports and mailings, you can determine whether the donor, the soft credit recipient, or both receive credit for the gift in the mailing or report. The soft credit distribution you select for the report or mailing does not affect the information entered on the Soft Credit tab of the planned gift record.

Constituent Name	Amount
Max Taylor	\$1,666.67
Melanie Taylor	\$1,666.67
Michelle Taylor	\$1,666.66

To soft credit a constituent for a planned gift, use the same procedure as for a regular planned gift record. For more information, see “Track Planned Gifts” on page 25.

## Automatically Apply Soft Credits

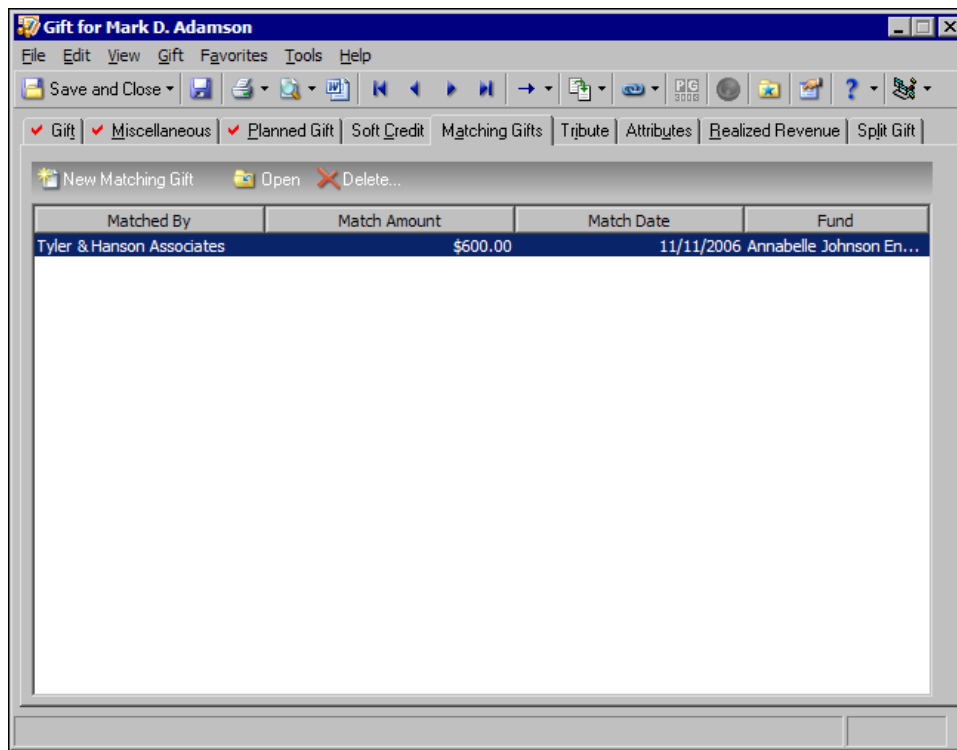
In *Configuration*, you can set a business rule to automatically copy soft credits from the Soft Credit tab of a gift record to the Soft Credit tab of the matching gift pledge record when you save the gift record. For example, if Frederick Thompson receives a soft credit for the full amount of the matched gift on Michael Simpson’s record, the program can automatically add Frederick to the Soft Credit tab of the matching gift pledge when you save the matched gift. After Frederick’s name appears on the Soft Credit tab of the matching gift record, you can change the soft credit distribution as necessary. For more information about setting business rules, see the *Configuration & Security Guide*.

## Matching Gifts Tab

Sometimes, companies match gifts donated to nonprofit organizations by their employees or corporate partners. For example, Winston Tate, a Toy World employee, donates a recurring gift of \$10 to your organization directly from his paycheck as a part of Toy World’s payroll giving program. As part of the payroll giving program, Toy World matches employee gifts on a one-to-one ratio when gifts meet certain criteria. Because Toy World matches gifts donated by their employees, you receive an additional \$10 gift from Toy World if Winston Tate’s gift meets the criteria set by Toy World.



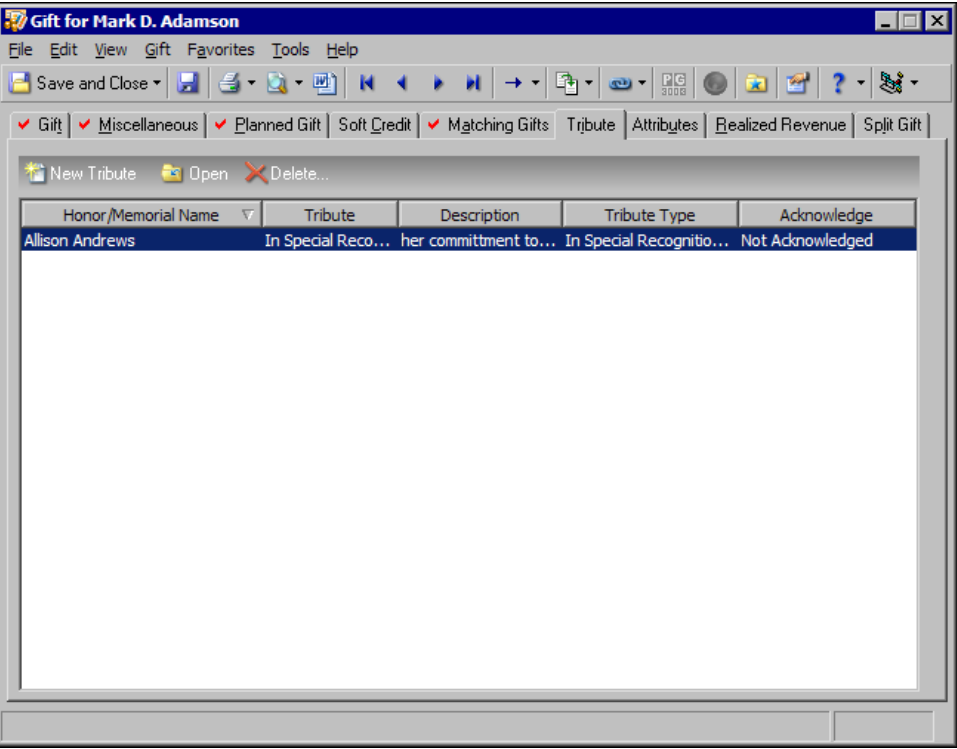
The majority of matching gift companies do not match planned gifts. However, the Matching Gift tab remains available for a planned gift record.



## Tribute Tab

**Warning:** Before you begin to add tribute gifts, you must set up the tribute on the Honor/Memorial tab of the honoree's constituent record. For information about how to create a new tribute, see the *Tribute Data Entry Guide*.

With the optional module *Honor/Memorial Tracking*, you can track detailed information about donations given in honor, memory, or celebration of an individual or organization. With *Honor/Memorial Tracking*, you can use the Tribute tab on a planned gift record to apply a gift to a tribute. A tribute explains the reason gifts are being donated to your organization on behalf of an honor/memorial constituent.



## Attributes Tab

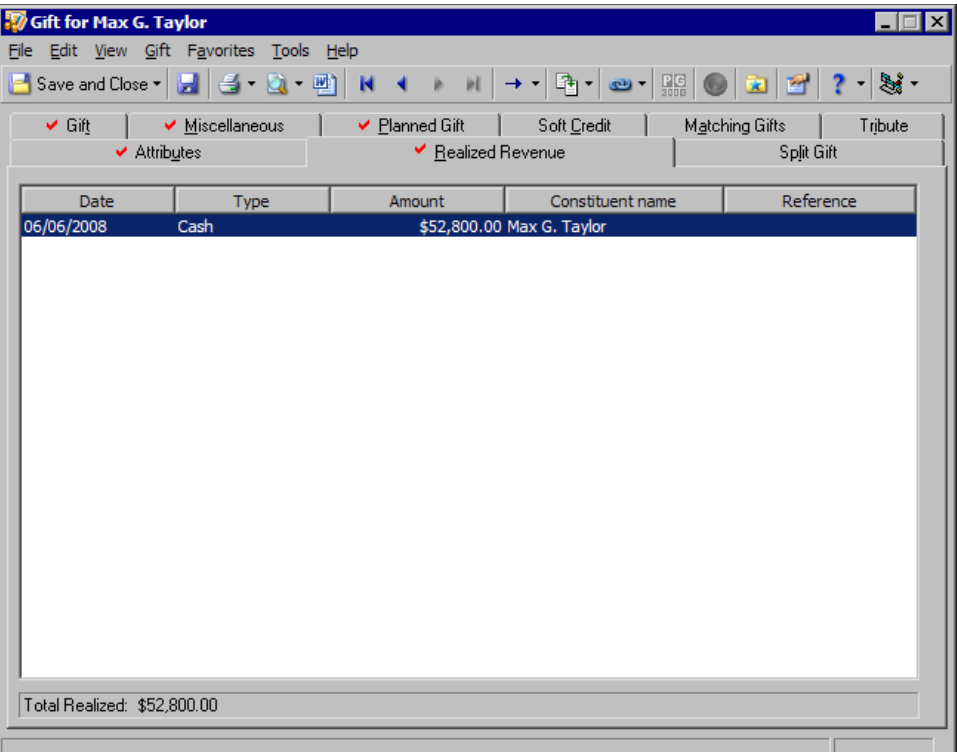
Throughout *The Raiser's Edge*, you can add attributes to track information specific to your organization. On a planned gift record, you can use the Attributes tab to store additional information about a planned gift. For example, you can add a "Source - Word of Mouth" attribute to note how a planned gift donor originally heard of planned giving for your organization. Later, you can create a query to locate all planned gift records with a certain attribute type to help analyze your planned gift records.

The screenshot shows a software window titled "Gift for Mark D. Adamson". The window has a menu bar with "File", "Edit", "View", "Gift", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several tabs: "Gift", "Miscellaneous", "Planned Gift", "Soft Credit", "Matching Gifts", and "Tribute". The "Planned Gift" tab is currently selected. Within this tab, there are three sub-sections: "Attributes", "Realized Revenue", and "Split Gift". The "Attributes" sub-section is active, showing a dropdown menu for "Attribute category" set to "<All Categories>". Below this is a table with the following columns: "Category", "Description", "Short Desc.", "Date", and "Comments". The table contains one row with the following data:

Category	Description	Short Desc.	Date	Comments
Source	Word of Mouth			

# Realized Revenue Tab

In *The Raiser's Edge*, you can add revenue realized from a planned gift or apply revenue received to a planned gift. You can apply revenue received from gifts of cash, stock, property, gift-in-kind, or other types to a planned gift. On the Realized Revenue tab of a planned gift record, you can view information about the revenue linked to the planned gift. For each gift linked to the planned gift, you can view the date, gift type, amount, constituent, and reference detail (if applicable) associated with the revenue. At the bottom of the tab, the **Total Realized** field displays the sum of the revenue amounts associated with the planned gift.



## Split Gift Tab

On the Split Gift tab, you can divide a planned gift between multiple campaigns, funds, appeals, or packages. When you split a gift, the program displays the campaigns, funds, appeals, and packages entered on the Split Gift tab in the corresponding fields on the Gift tab. Then, the program disables the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab. When you split a gift, you must edit the campaign, fund, appeal, and package information on the Split Gift tab.

Gift for Mohammed Rahman

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous Planned Gift Soft Credit Matching Gifts Tribute Attributes Realized Revenue Split Gift

Enter by: ☒ Amount ☐ Percent

Campaign	Fund	Appeal	Package	Amount
Planned Giving Campaign	Playground Site	Planned Giving Letter		
Annual Campaign	Annual Fund	Annual Mailing		

Distribute Evenly

Gift amount: \$500,000.00 Distributed: \$500,000.00 Remaining: \$0.00

02/14/2008

## Track Planned Gifts

**Note:** For more information about security for planned gifts, see the *Configuration & Security Guide*. For more information about reports for planned gifts, see the *Reports Guide* and the *Sample Reports Guide*. For more information about acknowledging gifts, see the *Mail Guide*.

Once a donor officially commits to a planned gift for your organization, you can add a planned gift record to your database in **The Raiser's Edge**. Once all scheduled payments from the planned gift are made and the final balance of the gift has been allocated to your final recipient(s), mark **Gift has been realized** and enter the **Remainder value/as of** information on the Gift tab of the original planned gift record. After you understand the tabs and options on a planned gift record, you can add a planned gift. For more information about the tabs on a planned gift record, see "Understand the Planned Gift Record" on page 9. This section explains how to add, edit, and delete planned gifts from the database.

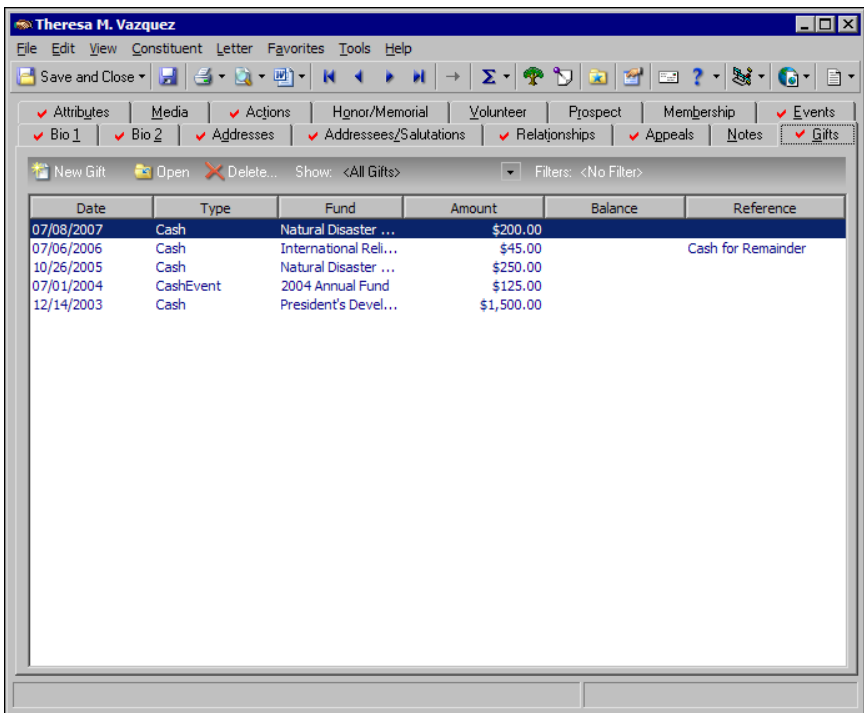
## Add a Planned Gift

When a donor commits to a planned gift, you must add a planned gift record to the database. To add this type of gift, create a new gift record and enter the appropriate information for a planned gift.

► Add a planned gift for a Bequest

**Scenario:** On March 3, 2008, Theresa Vazquez committed to a \$50,000 bequest gift to your organization. Theresa requests that her gift go to the Scholarship Campaign and the Camp Kids Scholarship fund. Your organization will receive the bequest at the time of her passing, and the planned gift is revocable. Theresa's commitment comes as a result of Ellen Crenshaw's extensive solicitation efforts. Theresa has appointed Attorney Hampton Judson as executor.

1. From Theresa Vazquez's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



2. On the action bar, click **New Gift**. The New Gift screen appears.

**Note:** For more information about gift data entry, see the *Gift Records Guide*.

3. In the **Gift type** field, select “Planned Gift”. Additional fields for planned gifts, such as the **Vehicle** and **NPV/as of** fields, appear.

4. In the **Gift date** field, enter the date the constituent commits to the planned gift to your organization, such as 03/03/2008.

**Note:** If you do not know the planned gift amount, you can enter \$0 in the **Amount** field.

5. In the **Amount** field, enter the amount of the planned gift, such as “\$50,000”.
6. In the **Campaign** field, select the campaign to which to apply the bequest, such as “Scholarship Campaign”. To search the database for the campaign, click the binoculars.
7. In the **Fund** field, select the fund to which to apply the bequest, such as “Camp Kids Scholarship”. To search the database for the fund, click the binoculars.
8. In the **Appeal** field, select the appeal used to solicit the planned gift, such as “Proposal Appeal”. To search the database for the appeal, click the binoculars.

You can add a new campaign, fund, or appeal from a gift record. To do this, click **Add New** on the Open screen when you search for a campaign, fund, or appeal. For more information, see the *Campaigns, Funds, and Appeals Data Entry Guide*.

9. In the **Solicitors** field, select the solicitor associated with the planned gift. In this scenario, select Ellen Crenshaw because Theresa committed to this planned gift because of Ellen’s solicitation efforts.

If multiple solicitors are associated with the planned gift, click **Solicitors**.

**Note:** *The Raiser’s Edge* does not calculate the estimated remainder value or net present value (NPV) amounts. We recommend you calculate these amounts in a third party software and enter them on *The Raiser’s Edge* planned gift record.

10. In the **Remainder value/as of** fields, enter an estimated remainder amount and date associated with the remainder value.

We recommend the amount in the **Remainder value** field reflect the expected income amount for your organization once all the conditions for a planned gift are met. In the **as of** date field, enter the last date the remainder value amount was updated.

11. In the **NPV/as of** fields, enter the net present value (NPV) and the current date, such as “\$50,000” and “03/03/2008”.

The NPV tracks what the gift is worth “today” when it matures. In the **as of** date field, enter the date you enter or adjust the NPV amount.

**Warning:** When you save a planned gift record, the **Gift Vehicle** field is disabled. To select a different vehicle type, do so before you save the planned gift.

12. In the **Vehicle** field, select “Bequest”.

13. In the **Gift status** field, select “Active”.

If you need an entry that does not exist in the **Gift status** field, you can type your entry directly into the field if you have security rights established. A message appears and asks whether to add the entry to that table. Click **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about setting up tables, see the *Configuration & Security Guide*.

14. In the **Expected maturity year** field, enter the year you predict the planned gift to be fully realized. Typically, you leave this field blank because you cannot predict the year of the donor’s passing.

**The Raiser’s Edge** does not calculate the expected maturity year. If you can calculate an expected maturity year, such as with a life expectancy table your organization has, you can enter in the year of your calculation.

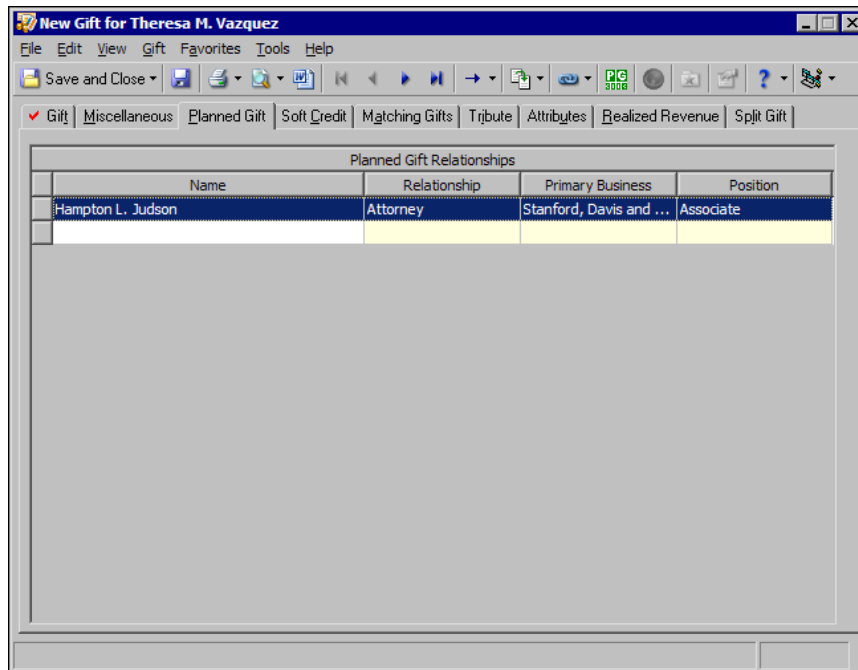
15. To include asset information, such as about a house, an automobile, or a stock asset for the donor, click **Assets**. In this scenario, leave the **Assets** field blank.
16. To track the gift as a revocable planned gift, mark **Revocable**.
17. Do not mark **Gift has been realized**. Mark this checkbox only when a planned gift has been completed, such as once the donor passes away.
18. Enter and select any additional gift information required on the Gift tab. For details about the remaining fields on the Gift tab, see the *Gift Records Guide*.
19. Select the Planned Gift tab.

**Note:** People and organizations that appear on the Search relationships for screen, such as when you click the binoculars in the **Planned Gift Relationships** grid, default from the Relationships tab on the constituent record. To add a new relationship record, click **Add New**. To edit an existing relationship record, you must edit the record from the Relationships tab.

20. In the **Planned Gift Relationships** grid, enter the names of any planned gift relationships. To enter a name, click in the **Name** column. When you place the cursor in this field, the binoculars appear.



In this scenario, because Theresa requests to use Hampton Judson as her attorney, click the binoculars to search for Hampton. When you locate him, his name appears in the first row of the **Name** column. The relationship, primary business, and position information default from the relationship record.



21. On the toolbar, click **Save and Close**. You return to the Gifts tab of the constituent record.

Once you receive money from the bequest, you must complete the planned gift record. To do this, mark **Gift has been realized** and enter the final values in the **Remainder value/as of** and **NPV/as of** fields on the Gift tab of the original planned gift record. For more information about how to edit a planned gift record, see "Edit a Planned Gift" on page 40.

► Add a planned gift for a lead annuity trust

**Scenario:** Max Taylor commits to a lead annuity trust on February 2, 2008. He donates \$800,000 for the planned gift. He designates that your organization receives \$50,000 of this amount on an annual basis. These annual payments begin on June 6, 2008. Max wants to contribute earnings from the lead annuity trust to the International Relief Fund. The lead annuity trust account is with the American Savings and Loan bank account, Max's preferred bank. This planned gift is not revocable.

There are multiple ways to track annuities in *The Raiser's Edge*. This scenario uses the example of tracking a lead annuity trust as an actual fund. You can also create one fund for all annuities. We do not recommend one specific way but encourage you to research and find the best plan to suit your organization's needs.

1. From Max Taylor's constituent record, select the Gifts tab. For more information about how to open a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

Date	Type	Fund	Amount	Balance	Reference
11/15/2007	Cash	Natural Disaster ...	\$5,000.00		
07/17/2006	Recurring Gift Pa...	Playground Site	\$250.00		
01/03/2006	Cash	Richard Mosley M...	\$675.00		
07/29/2005	Cash	Smith-Brown Sch...	\$500.00		
07/15/2005	Recurring Gift Pa...	Playground Site	\$250.00		
01/12/2005	Recurring Gift Pa...	Playground Site	\$250.00		
12/03/2004	Cash	Building Fund	\$100.00		
07/05/2004	Recurring Gift Pa...	Playground Site	\$100.00		
06/06/2004	Cash	Building Fund	\$2,000.00		
04/05/2004	Recurring Gift Pa...	Playground Site	\$100.00		
01/05/2004	Recurring Gift Pa...	Playground Site	\$100.00		
12/01/2003	Recurring Gift Pa...	Playground Site	\$25.00		
11/06/2003	Recurring Gift Pa...	Playground Site	\$25.00		
07/07/2003	Recurring Gift Pa...	Playground Site	\$25.00		
06/23/2003	Recurring Gift	Playground Site	\$250.00		
04/20/2002	CashMem	2002 Membership...	\$85.00		

2. On the action bar, click **New Gift**. The New Gift screen appears.

**Note:** For more information about gift data entry, see the *Gift Records Guide*.

- In the **Gift type** field, select “Planned Gift”. Additional fields for planned gifts, such as the **Vehicle** and **NPV/as of** fields, appear.

- In the **Gift date** field, enter the date the constituent commits to the planned gift to your organization. For example, enter “02/02/2008”, the date Max commits to a lead trust annuity.
- In the **Amount** field, enter the amount of the planned gift, such as “\$800,000”.
- In the **Fund** field, select the fund to which to apply the planned gift, such as “Max and Michelle Taylor Lead Annuity Trust Fund”.

In this scenario, we assume the organization tracks a lead annuity trust as an individual fund in **The Raiser’s Edge**. For more information about how to add a fund to your database, see the *Campaigns, Funds, and Appeals Data Entry Guide*.

- In the **Remainder value/as of** fields, enter the amount and date associated with the remainder value, such as “\$432,000” and “02/02/2008”.

**Note:** **The Raiser’s Edge** does not calculate the estimated remainder value or net present value amounts. Calculate these amounts in a third party software and enter them on **The Raiser’s Edge** planned gift record.

We recommend the amount in the **Remainder value** field reflect the expected income amount for your organization once all conditions for a planned gift are met. In the **as of** date field, enter the last date the remainder value amount was updated. For more information about this field, see “Edit a Planned Gift” on page 40.

- In the **NPV/as of** fields, enter the net present value (NPV) and the current date, such as “\$432,000” and “02/02/2008”.

The net present value (NPV) tracks what the gift is worth “today” when it matures. In the **as of** date field, enter the last date you adjust the NPV amount.

- In the **Vehicle** field, select “Lead Annuity Trust”.

When you save a planned gift record, the **Vehicle** field is disabled. To select a different vehicle type, do so before you save the planned gift record.

- In the **Gift status** field, select “Active”.

If you need an entry that does not exist in the drop-down list for the **Gift status** field, you can type your entry directly into the field if you have security rights established. A message appears and asks whether to add the entry to that table. Click **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of **Configuration**. For information about setting up tables, see the *Configuration & Security Guide*.

11. In the **Expected maturity year** field, enter the year you predict the planned gift to be fully realized. Typically, you leave this field blank because you cannot predict the year of the donor's passing.

**The Raiser's Edge** does not calculate the expected maturity year. If you can calculate an expected maturity year, such as with a life expectancy table your organization has, you can enter the year of your calculation.

12. To include asset information for the donor, such as about a house, an automobile, or a stock asset for the donor, click **Assets**. For this scenario, leave the **Assets** field blank.
13. To track a gift as a revocable planned gift, mark **Revocable**. For this scenario, Max's Lead Annuity Trust is not revocable, so do not mark this checkbox.
14. Do not mark **Gift has been realized**. Mark this checkbox only when a planned gift is completed or when its time period has expired.
15. Enter and select any other gift information required. For details about the remaining gift fields, see the *Gift Records Guide*.
16. Select the Planned Gift tab.
17. In the **Payout % / amount** field, enter the payment amount your organization receives from the trust. In this scenario, leave the **Payout %** field blank and, in the **amount** field, enter "\$50,000".
18. In the **Payment frequency** field, select the frequency at which your organization receives payments from the trust, such as "Annual".
19. In the **First payment date** field, enter the date of the first payment to your organization, such as "06/06/2008".
20. In the **Discount rate %** field, enter the current discount rate for planned gifts. You can obtain this rate from the IRS.
21. In the **Term type** field, select whether the term of the retained life estate lasts until a fixed date, the life of the constituent, or the shorter or longer of either.

Your selection in the **Term type** field affects the other fields that appear on the Planned Gifts tab. For example, if you select "Fixed Term", the **Term end date** field appears. In the **Term end date** field, enter the projected end date of the term.

22. In the **Trust tax ID number** field, enter the federal tax ID number of the trust.

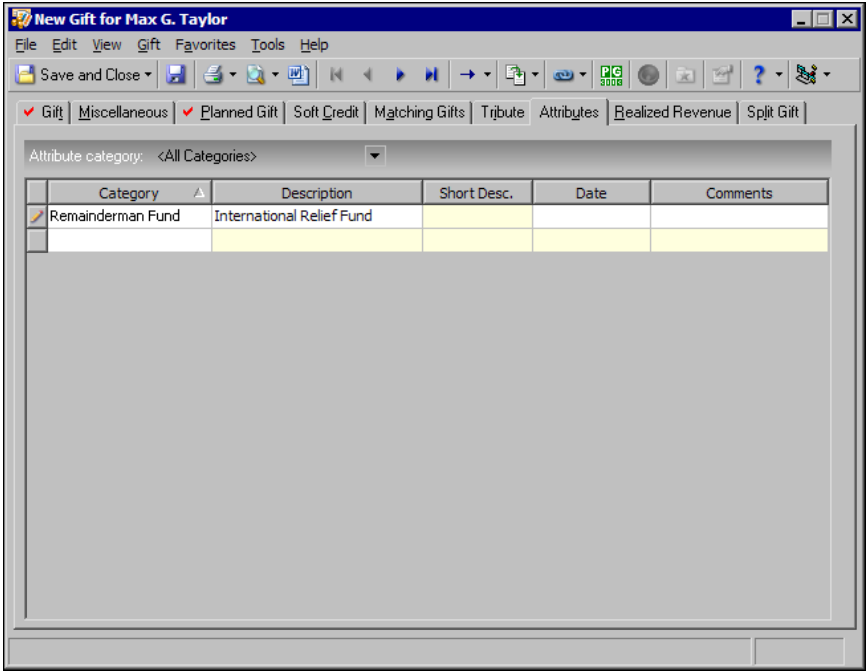
**Note:** People and organizations that appear on the Search relationships for screen, such as when you click the binoculars in the **Beneficiaries** or **Planned Gift Relationships** grid, default from the Relationships tab on the constituent record. To add a new relationship record, click **Add New**. To edit an existing relationship record, you must edit the record from the Relationships tab.

23. In the **Beneficiaries** grid, enter the beneficiaries for the lead annuity trust.
- To enter the constituent as a beneficiary, mark **Constituent is a beneficiary**. In this scenario, since Max does not receive income from the lead annuity trust, do not mark this checkbox.
  - To enter the name of a beneficiary, click the first cell in the **Name** column. When you put the cursor in this field, the binoculars appear. Click the binoculars to search for a relationship record.  
If the Relationships tab on the constituent record contains relationship and age information, this information defaults in the **Relationship** and **Age** columns.
  - In the **Type** column, select beneficiary types. The types in the drop-down list depend on the gift vehicle selected on the Gift tab. For example, for a lead annuity trust, select Donor, Non-Income, or Donor + Non-Income.
24. In the **Planned Gift Relationships** grid, enter the names of the planned gift relationships, such as the attorney or financial advisor who reviewed the annuity agreement for the constituent.  
To enter the name of a planned gift relationship, click the first cell in the **Name** column. When you put the cursor in this field, the binoculars appear.  
In this scenario, because Max's income distribution is sent to his American Savings and Loan bank account, click the binoculars to search for American Savings and Loan. When you locate the bank, the name appears in the first row of the **Name** column. The **Relationship** information defaults from the relationship record.  
If the Relationships tab on the constituent record contains primary business and position information, it defaults in the **Primary Business** and **Position** columns.
25. Select the Attributes tab.
26. In the **Category** column, select "Remainderman Fund".

**Note:** If you need a gift attribute that does not exist for the planned gift, add the attribute to the database in *Configuration*. For information about creating attributes, see the *Configuration & Security Guide*.

27. In the **Description** column, enter the fund to which to apply the earnings from the lead annuity trust. In this scenario, since Max requests that all earnings from his lead annuity trust go to the International Relief Fund, enter “International Relief Fund”.

When you add a gift attribute to a lead annuity trust planned gift record, you can track the remainderman fund for the remainder value of the annuity once all conditions have been met. In *Reports*, you can select the gift attribute parameter for a certain remainderman fund to process a planned giving report on the fund. For more information about planned giving reports, see the *Reports Guide* and the *Sample Reports Guide*.

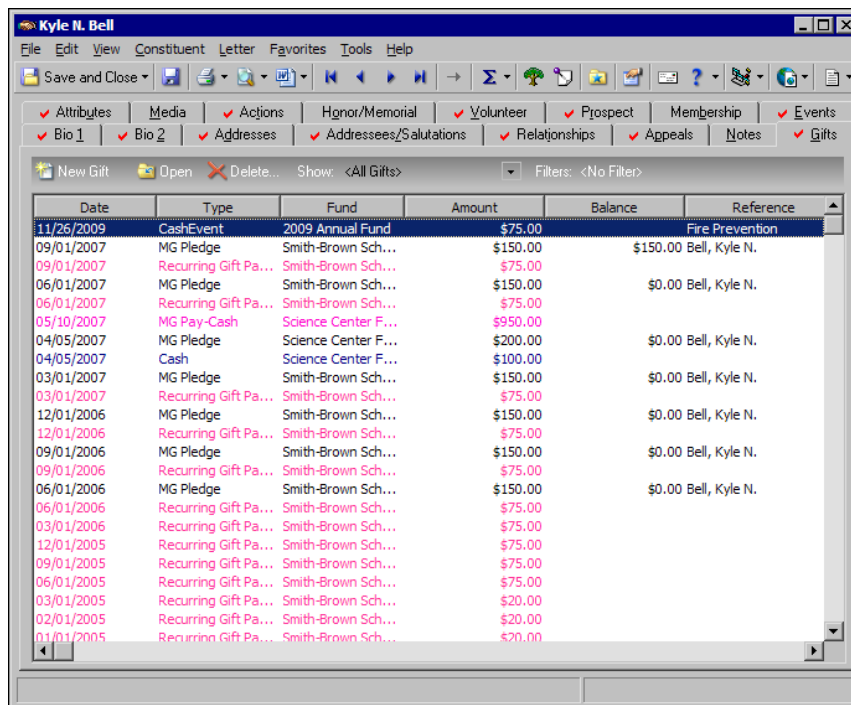


28. On the toolbar, click **Save and Close**. You return to the Gifts tab.
- Once the lead annuity trust matures and all conditions are met, you must complete the planned gift record. To do this, mark **Gift has been realized** and enter the values in the final **Remainder value/as of** and **NPV/as of** fields on the Gift tab of the original planned gift record. For more information about how to edit a planned gift record, see “Edit a Planned Gift” on page 40.

## ▶ Add a planned gift for a retained life estate

**Scenario:** Through a retained life estate, Kyle Bell plans to leave his home in Pahoehoe, Hawaii (worth \$2,500,000) to your organization. He states that if his wife Julia outlives him, she retains the right to live in the house until the time of her passing. To track this information, you must create a planned gift record for a retained life estate. Kyle wants to be eligible for tax benefits. Therefore, the gift is not revocable. Lastly, Benjamin Connor is Kyle's real estate attorney.

1. From Kyle Bell's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



Date	Type	Fund	Amount	Balance	Reference
11/26/2009	CashEvent	2009 Annual Fund	\$75.00		Fire Prevention
09/01/2007	MG Pledge	Smith-Brown Sch...	\$150.00	\$150.00	Bell, Kyle N.
09/01/2007	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
06/01/2007	MG Pledge	Smith-Brown Sch...	\$150.00	\$0.00	Bell, Kyle N.
06/01/2007	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
05/10/2007	MG Pay-Cash	Science Center F...	\$950.00		
04/05/2007	MG Pledge	Science Center F...	\$200.00	\$0.00	Bell, Kyle N.
04/05/2007	Cash	Science Center F...	\$100.00		
03/01/2007	MG Pledge	Smith-Brown Sch...	\$150.00	\$0.00	Bell, Kyle N.
03/01/2007	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
12/01/2006	MG Pledge	Smith-Brown Sch...	\$150.00	\$0.00	Bell, Kyle N.
12/01/2006	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
09/01/2006	MG Pledge	Smith-Brown Sch...	\$150.00	\$0.00	Bell, Kyle N.
09/01/2006	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
06/01/2006	MG Pledge	Smith-Brown Sch...	\$150.00	\$0.00	Bell, Kyle N.
06/01/2006	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
03/01/2006	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
12/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
09/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
06/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$75.00		
03/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$20.00		
02/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$20.00		
01/01/2005	Recurring Gift Pa...	Smith-Brown Sch...	\$20.00		

2. On the action bar, click **New Gift**. The New Gift screen appears.

**Note:** For more information about gift data entry, see the *Gift Records Guide*.

3. In the **Gift type** field, select “Planned Gift”. Additional fields for planned gifts, such as the **Vehicle** and **NPV/as of** fields, appear.

The screenshot shows a software window titled "New Gift for Kyle N. Bell". The window has a menu bar (File, Edit, View, Gift, Favorites, Tools, Help) and a toolbar. Below the toolbar is a tabbed interface with tabs: Gift (selected), Miscellaneous, Planned Gift, Soft Credit, Matching Gifts, Tribute, Attributes, Realized Revenue, and Split Gift. The main form area contains the following fields and values:

- Constituent: Kyle Bell, ID: 174
- Gift type: Planned Gift (dropdown)
- Gift subtype: (empty dropdown)
- Gift date: 03/03/2008 (calendar icon)
- Amount: \$2,500,000.00 (currency icon)
- Campaign: Capital Campaign (dropdown)
- Fund: President's Development Fund (dropdown)
- Appeal: (empty dropdown)
- Package: (empty dropdown)
- Solicitors: (empty dropdown)
- Vehicle: Retained Life Estate (dropdown)
- Gift status: Active (dropdown)
- Reference: (empty text field)
- Acknowledge: Not Acknowledged (dropdown)
- Letter: (checked checkbox)
- Receipt: Not Received (dropdown)
- Receipt amt/no.: \$2,500,000.00 (currency icon)
- Remainder value/as of: \$2,500,000.00 (currency icon), 03/03/2008 (calendar icon)
- NPV/as of: \$2,500,000.00 (currency icon), 03/03/2008 (calendar icon)
- Expected maturity year: (empty text field)
- Assets: (button)
- Revocable: (unchecked checkbox)
- Gift has been realized: (unchecked checkbox)

4. In the **Gift date** field, enter the date the donor commits to the retained life estate.
5. In the **Amount** field, enter the amount of the planned gift, such as “\$2,500,000”.
6. In the **Campaign** and **Fund** fields, enter the campaign and fund to which to apply the planned gift. In this scenario, Kyle did not specify a campaign or fund for his retained life estate and left the designations up to your organization. In the **Campaign** field, select “Capital Campaign”. In the **Fund** field, select “President’s Development Fund”.

**Note:** *The Raiser’s Edge* does not calculate the estimated remainder value or net present value (NPV) amounts. We recommend you calculate these amounts in a third party software and enter them on *The Raiser’s Edge* planned gift record.

7. In the **Remainder value/as of** fields, enter the amount and date associated with the remainder value, such as “\$2,500,000” and your planned gift date.

We recommend the amount in the **Remainder value** field reflect the expected income amount for your organization once all the conditions for a planned gift are met. In the **as of** date field, enter the last date you adjusted the remainder value amount.

8. In the **NPV/as of** fields, enter the value and date associated with the net present value (NPV), such as “\$2,500,000” and the planned gift date.

The NPV tracks what the gift is worth “today” when it matures. In the **as of** date field, enter the last date you adjusted the NPV amount.

**Warning:** When you save a planned gift record, the **Vehicle** field is disabled. To select a different vehicle type, you must do so before you save the planned gift.

9. In the **Vehicle** field, select “Retained Life Estate”.



**Note:** If you need an entry that does not appear as a selection in the **Gift status** field, you can type your entry directly into the field if you have security rights established. A message appears to ask whether to add the entry to that table. Click **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of **Configuration**. For information about setting up tables, see the *Configuration & Security Guide*.

10. In the **Gift status** field, select "Active".
11. In the **Expected maturity year** field, enter the year you predict the planned gift to be fully realized. In this scenario, because you cannot predict the year of Kyle's or his wife's passing, leave this field blank.

**The Raiser's Edge** does not calculate the expected maturity year. If you can calculate an expected maturity year, such as with a life expectancy table your organization has, you can enter in the year of your calculation.

12. To include asset information about the estate, click **Assets**. The Assets for Planned Gift screen appears.

Asset Type	Description	Amount	Cost Basis
Primary Residence	6000 square foot home; oc...	\$2,500,000.00	\$0.00

- a. In the **Asset Type** column, select the type of asset associated with the planned gift. In this scenario, select "Primary Residence".
- b. In the **Description** column, enter a description or details of the asset, such as "6000 square foot home; ocean front".
- c. In the **Amount** column, enter the current value of the asset. For this scenario, enter "\$2,500,000", the current worth of the Paho, Hawaii house.
- d. Typically, you do not track the cost basis for a retained life estate. Therefore, in the **Cost Basis** column, leave the default "\$0".

The **Cost Basis** column displays the cost of the asset at the time your organization receives it. A gift of stock is an example of an asset for which you want to track cost basis.

- e. To return to the Gift tab, click **OK**.

13. To specify the planned gift as revocable, mark **Revocable**. In this scenario, Kyle wants to be eligible for tax benefits for this retained life estate, so do not mark this checkbox.
14. Do not mark **Gift has been realized**. You mark this checkbox only when a planned gift has been completed, such as once Kyle and his wife both pass away.
15. Enter and select any other gift information required. For details about the remaining gift fields, see the *Gift Records Guide*.

16. Select the Planned Gift tab.

The screenshot shows the 'New Gift for Kyle N. Bell' window with the 'Planned Gift' tab selected. The window has a menu bar (File, Edit, View, Gift, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Gift, Miscellaneous, Planned Gift (selected), Soft Credit, Matching Gifts, Tribute, Attributes, Realized Revenue, and Split Gift. The main area contains the following fields and sections:

- Discount rate %:** 4.600
- Term type:** Lives Only
- Address block:** 976 Ocean Shore Drive, Pahoa, HI 78741
- Address List...** button
- ☐ Constituent is a beneficiary
- Beneficiaries table:**

Name	Relationship	Age	Type
- Planned Gift Relationships table:**

Name	Relationship	Primary Business	Position

17. In the **Discount rate %** field, enter the current discount rate for planned gifts. You can obtain this rate from the IRS.
18. In the **Term type** field, select whether the term of the retained life estate lasts until a fixed date, the life of the constituent, or the shorter or longer of either. In this scenario, select "Lives Only".  
Your selection in the **Term type** field affects the other fields that appear on the Planned Gifts tab. For example, if you select "Fixed Term", the **Term end date** field appears. In this field, enter the projected end date for the term.
19. In the **Address block** box, enter the address associated with the retained life estate.

To select the address:

- a. Click **Address List**. The Search Addresses for screen appears and displays the addresses associated with the constituent.

The screenshot shows the 'Search addresses for Kyle N. Bell' window. It has a 'Find:' dropdown menu set to '<All Addresses>'. Below is a table with columns: Address Type, Indicator, Address, City/State, Preferred?, and a checkbox. The first row is highlighted:

Address Type	Indicator	Address	City/State	Preferred?	
Home	Preferred	976 Ocean Shore Drive	Pahoa, HI	<input checked="" type="checkbox"/>	<input type="checkbox"/>

On the right side of the window are buttons: Open, Cancel, Add New, and Find...

- b. In the grid, select the address associated with the retained life estate.
- c. Click **Open**. You return to the Planned Gift tab of the planned gift record. In the **Address block** box, the selected address automatically appears.

**Note:** People and organizations that appear on the Search relationships for screen, such as when you click the binoculars in the **Beneficiaries** or **Planned Gift Relationships** grid, default from the Relationships tab on the constituent record. To add a new relationship record, click **Add New**. To edit an existing relationship record, you must edit the record from the Relationships tab.

20. In the **Beneficiaries** grid, enter the beneficiaries for the retained life estate.

- a. If the constituent is a beneficiary of the planned gift, mark **Constituent is a beneficiary**. In this scenario, since Kyle retained the right to use the house until his passing, mark this checkbox.

When you mark **Constituent is a beneficiary**, the donor's name defaults automatically in the **Beneficiaries** grid.

- b. To enter the name of another beneficiary, click the second cell in the **Name** column. When you put the cursor in this field, the binoculars appear. In this scenario, because Kyle requests that his wife Julia retains the right to remain in the house until her passing if she outlives him, click the binoculars to search for Julia Bell.

When you locate Julia, her name appears in the first row of the **Name** column. The relationship and age information default from the relationship record.

- c. In the **Type** column, select the beneficiary type of the beneficiaries. In this scenario, select "Donor + Non-Income" for Kyle since he is the primary donor of the planned gift and does not receive a monetary benefit from the gift. For Julia, select "Non-Income" since she does not receive income from the organization for the planned gift.

The selections in the **Type** field depend on the vehicle selected on the Gift tab. For example, for a retained life estate, you can select a "Donor", "Non-Income", or "Donor + Non-Income".

21. In the **Planned Gift Relationships** grid, enter the names of planned gift relationships, such as the attorney or financial advisor who reviewed the estate agreement for the constituent.

To enter a planned gift relationship, click the first cell in the **Name** column. When you put the cursor in this field, the binoculars appear. In this scenario, because Kyle requests to use Benjiman Connor as his attorney, click the binoculars to search the database for Benjiman.

When you find Benjiman in the database, his name appears in the first row of the **Name** column. The relationship, primary business, and position information default from the relationship record.

22. On the toolbar, click **Save and Close**. You return to the Gifts tab of the constituent record.

Once you receive money from the home, such as when the planned gift matures and the home is sold, you must complete the planned gift record. To do this, mark **Gift has been realized** and enter the final values in the **Remainder value/as of** and **NPV/as of** fields on the Gift tab of the original planned gift record. For more information about how to edit a planned gift record, see “Edit a Planned Gift” on page 40.

## Edit a Planned Gift

We recommend you edit a planned gift for two main reasons.

- When you receive a payment for the planned gift, you can create a gift record for the payment that links to the original planned gift record. To link a payment for a planned gift, open the planned gift record. The new gift is created from the original planned gift record. If the gift record exists, open the gift record to link it to a planned gift record.
- When the planned gift matures, you can complete the planned gift record. To do this, you must edit planned gift information on the Gift tab of the original planned gift record. You can edit a gift record if you have security rights. For more information about security, see the *Configuration & Security Guide*.

You may also edit a planned gift to update the **Remainder value/as of** and **NPV/as of** fields. We recommend you update this information periodically throughout the life of the planned gift.

### ► Create and link a new payment to a planned gift

1. Open the planned gift record to link to the new gift. For more information about how to open a planned gift record, see “Open an existing planned gift from the Records page” on page 5.

The screenshot shows a software window titled "Gift for Max G. Taylor". The menu bar includes File, Edit, View, Gift, Favorites, Tools, and Help. The toolbar contains icons for Save and Close, and other standard window controls. The "Gift" tab is selected, showing a list of tabs: Gift, Miscellaneous, Planned Gift, Soft Credit, Matching Gifts, Tribute, Attributes, Realized Revenue, and Split Gift. The main form area contains the following fields:

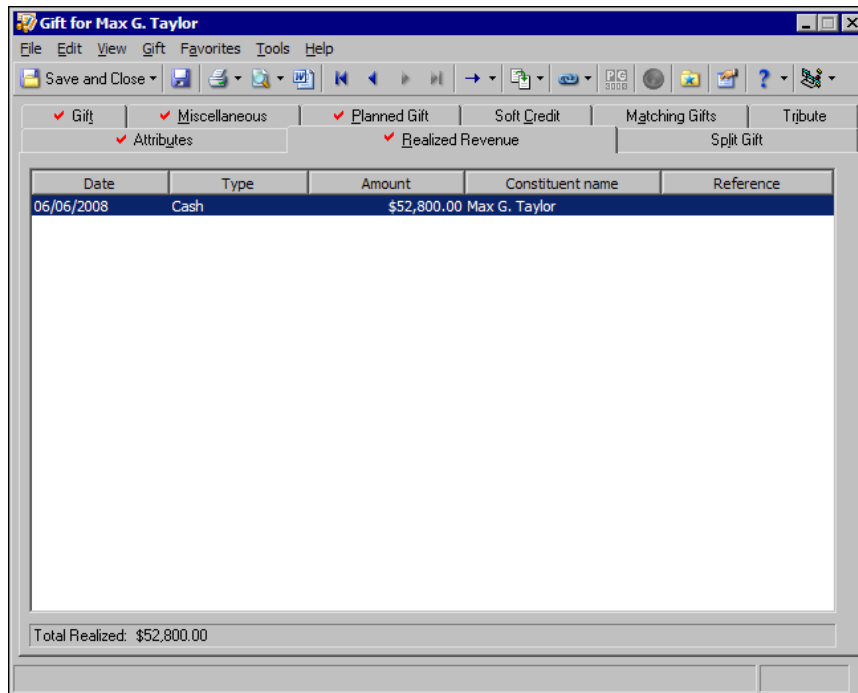
- Constituent: Max Taylor, ID: 77
- Gift type: Planned Gift (dropdown)
- Gift subtype: Annuity (dropdown)
- Gift date: 02/02/2008 (calendar icon)
- Amount: \$800,000.00 (text box)
- Campaign: (dropdown)
- Fund: Max and Michelle Taylor Gift Ann (dropdown)
- Appeal: (dropdown)
- Package: (dropdown)
- Solicitors: (dropdown)
- Vehicle: Lead Annuity Trust (dropdown)
- Gift status: Active (dropdown)
- Reference: (text box)
- Acknowledge: Not Acknowledged (dropdown)
- Letter: (dropdown)
- Receipt: Not Received (dropdown)
- Receipt amt/no.: \$800,000.00 (text box)
- Remainder value/as of: \$432,000.00 (text box), 02/02/2008 (calendar icon)
- NPV/as of: \$432,000.00 (text box), 02/02/2008 (calendar icon)
- Expected maturity year: (text box)
- Assets: (button)
- Revocable: (checkbox)
- Gift has been realized: (checkbox)

2. On the menu bar, select **Gift, Add Revenue Realized from Planned Gift**. A new gift record appears. Some information from the planned gift record, such as from the **Amount**, **Fund**, and **Letter** fields, default into the appropriate fields on this gift record.
3. In the **Gift type** field, select the type of gift received. You can select “Cash”, “Stock/Property”, “Gift-in-Kind”, or “Other”.

4. Enter and select any other gift information required. For details about the remaining gift fields, see the *Gift Records Guide*.

**Note:** To view the planned gift record, click **View linked Planned Gift**.

5. To save the payment, click **Save and Close** on the toolbar. You return to the planned gift record.
6. To view the linked gift information, select the Realized Revenue tab.



**Note:** The Realized Revenue tab does not calculate a planned gift balance. The tab only calculates a total amount for received gifts.

7. To access another linked gift from the Realized Revenue tab, from the **Gift** menu, select **Go to**.
8. To close the planned gift record, select **Save and Close** on the toolbar.

#### ► Link an existing gift record to a planned gift record

You can link an existing gift record as a payment for a planned gift record if these conditions are met:

- The constituent has an existing planned gift record.
- The gift type is Cash, Stock/Property, Gift-In-Kind, or Other.
- The gift record does not include a matching gift.
- You have security rights to edit planned gift records.

1. Open the existing gift record to apply to the planned gift. For more information about how to open a gift record, see “Open an existing planned gift from the Records page” on page 5.

2. From the **Gift** menu, select **Apply to, Planned Gift**. The Apply Gift to Planned Gift screen appears.

3. In the **Apply** column, mark the checkbox next to the planned gift to which to apply the gift.

**Note:** To break the link between the gift record and the planned gift record, unmark the checkbox on the Apply Gift to Planned Gift screen and click **OK**.

4. Click **OK**. You return to the Gift tab of the gift record.

**Note:** To view the planned gift record, click **View linked Planned Gift**.

5. To close the gift record, select **Save and Close** on the toolbar.

► **Edit a planned gift record for a mature planned gift**

1. Open the existing planned gift record and select the Gift tab. For more information about how to open a planned gift record, see “Open an existing planned gift from the Records page” on page 5.

**Note:** To recall the remainderman fund for the remainder value, select the Attributes tab. You can track remainderman funds as a gift attribute.

2. In the **Remainder value/as of** field and the **NPV/as of** field, enter the remainder value and the net present value (NPV).
3. In the **Gift status** field, select “Mature”.  
If the selection you need does not appear in the **Gift status** field, you can type your entry directly into the field if you have security rights established. A message appears and asks whether to add the entry to that table. Click **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of **Configuration**. For information about setting up tables, see the *Configuration & Security Guide*.
4. In the **Expected maturity year** field, enter the year the planned gift matured.

5. Because all conditions of the planned gift are met, mark **Gift has been realized**.

The screenshot shows the 'Gift for George D. Finley' application window. The 'Planned Gift' tab is selected. The form contains the following fields and values:

- Constituent:** George Finley, ID: 21
- Gift type:** Planned Gift
- Gift subtype:** (empty)
- Gift date:** 08/07/2010
- Amount:** \$650,000.00
- Campaign:** Playground Campaign
- Fund:** Building Fund
- Appeal:** Proposal Appeal
- Package:** (empty)
- Solicitors:** (empty)
- Vehicle:** Bequest
- Gift status:** Mature
- Reference:** (empty)
- Acknowledge:** Not Acknowledged
- Letter:** (checked)
- Receipt:** Not Receipted
- Receipt amt/no.:** \$650,000.00
- Remainder value/as of:** \$650,000.00, 08/07/2070
- NPV/as of:** \$650,000.00, 08/07/2070
- Expected maturity year:** 2017
- Assets:** (empty)
- Revocable:** (unchecked)
- Gift has been realized:** (checked)
- Date added:** (empty)

To link a gift to the planned gift record, see “Create and link a new payment to a planned gift” on page 40 or “Link an existing gift record to a planned gift record” on page 41.

6. To close and save the planned gift record, click **Save and Close** on the toolbar.

## Delete a Planned Gift

If you have security rights, you can delete a gift record from the database. We strongly recommend you make a backup copy of the database before you delete any information from *The Raiser's Edge*.

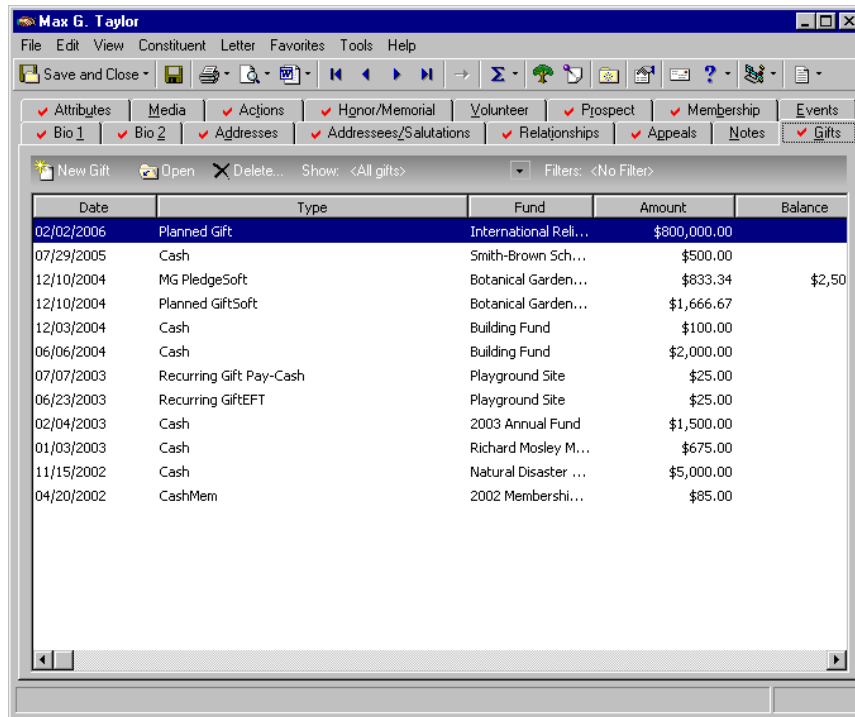
When you delete a gift record that is linked to a planned gift record, a warning message appears to confirm the deletion of the gift. If you click **Yes**, the program deletes the gift and breaks the link between it and the planned gift.



# Delete a planned gift from the Gifts tab of a constituent record

If you delete a planned gift that is linked to a gift record, a warning message appears to confirm the deletion of the planned gift. If you click **Yes**, the program breaks the link between the gifts and deletes the planned gift.

1. From a constituent record, select the Gifts tab. For more information about how to access a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



Date	Type	Fund	Amount	Balance
02/02/2006	Planned Gift	International Reli...	\$800,000.00	
07/29/2005	Cash	Smith-Brown Sch...	\$500.00	
12/10/2004	MG PledgeSoft	Botanical Garden...	\$833.34	\$2,50
12/10/2004	Planned GiftSoft	Botanical Garden...	\$1,666.67	
12/03/2004	Cash	Building Fund	\$100.00	
06/06/2004	Cash	Building Fund	\$2,000.00	
07/07/2003	Recurring Gift Pay-Cash	Playground Site	\$25.00	
06/23/2003	Recurring GiftEFT	Playground Site	\$25.00	
02/04/2003	Cash	2003 Annual Fund	\$1,500.00	
01/03/2003	Cash	Richard Mosley M...	\$675.00	
11/15/2002	Cash	Natural Disaster ...	\$5,000.00	
04/20/2002	CashMem	2002 Membershi...	\$85.00	

2. In the grid, select the gift to delete.
3. On the action bar, click **Delete**. A message appears to confirm the deletion of the gift record.
4. To delete the gift record, click **Yes**.
5. To save the changes and close the constituent record, click **Save and Close** on the toolbar.



# Planned Gifts Migration Tool



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# Planned Gifts Migration Tool

**Note:** For information about how to download and install the Planned Gifts Migration Tool, refer to Knowledgebase tip #BB373124.

With *PlannedGiftTracker* for **The Raiser's Edge**, you can create gift records with a gift type of Planned Gift. These records contain fields unique to planned giving. Previously, you may have stored planned gifts in **The Raiser's Edge** as Other gift records using gift attributes, gift subtypes, or gift codes. The Planned Gifts Migration Tool migrates these records into new planned gift records using the new fields for planned giving.

**Warning:** Before you perform a global delete, we recommend you back up your database.

During the migration, you can select to generate a static query of the original gift records copied to new planned gift records. After the migration is complete, you may want to perform a global delete of the original gift records. If you do this, you can use the generated static query to clean up your gift records.

**The Raiser's Edge** does not currently support the posting of planned gifts to the general ledger. If the planned gifts you want to migrate are posted, you must post the appropriate amounts for the new planned gift records to your accounting software - not through **The Raiser's Edge**. If you delete the original gift records following migration, the posted amounts for the original gifts are offset in the general ledger.

- You must run the Planned Gifts Migration Tool from a machine that has **The Raiser's Edge** installed.
- Every screen in the Planned Gifts Migration Tool provides instructional information. For a successful migration, read and understand all of the information before processing.
- To use the Planned Gifts Migration Tool, you must have Supervisor rights to **The Raiser's Edge**.
- With this tool, you can only migrate planned gifts stored in **The Raiser's Edge** as gift subtypes, gift attributes, or gift codes. For information about how to migrate data not supported by this tool, contact [solutions@blackbaud.com](mailto:solutions@blackbaud.com).
- For information about *PlannedGiftTracker*, see the *Planned Gift Tracking Guide*.

# Step 1

Select the option for the field that you previously used to track Gift Vehicle information for your planned gifts. Use the grid to indicate the value in that field that corresponds to each of The Raiser's Edge Gift Vehicles listed.

Include:

Planned gift vehicle stored as: ☒ Gift subtype ☐ Gift attribute ☐ Gift code

Gift Vehicle	Selected Value
Bequest	
Gift Annuity	
Lead Annuity Trust	
Remainder Annuity Trust	
Lead Unitrust	
Remainder Unitrust	
Pooled Income Fund	
Retained Life Estate	
Life Insurance	
Other Planned Gift	

< Back   Next >   Cancel   Change Now

- ☐ In the **Include** field, select the query of original gift records to convert to planned gift records.

**Note:** If you are not ready to migrate your planned giving information, click **Cancel** on the Planned Gifts Migration Tool.

For the migration tool, you must have a gift query. If you have not created a gift query, click the binoculars button. The Open Query screen appears. To create a new query, click **Add New**. For more information about how to create a query, see the *Query & Export Guide*.

- ☐ For the **Planned gift vehicle stored as** option, select whether you previously stored your planned gifts as a gift subtype, gift attribute, or gift code.
- ☐ The fields in the **Gift Vehicle** column are the planned giving vehicles available in *The Raiser's Edge*. In the **Selected Value** column, select your previously used vehicle types that correspond to *The Raiser's Edge* gift vehicles.
- ☐ If you select **Gift attribute**, the **Category** and **Description** columns appear on the screen. In the **Category** and **Description** columns, select the gift attribute vehicle that corresponds to the *Raiser's Edge* vehicles in the **Gift Vehicle** column.

## Step 2

**Planned Gifts Migration Tool**

Indicate the values stored as Gift Attributes that correspond to each Raiser's Edge planned gift field.

NOTE: If the current attribute data is stored in an incompatible format, it will be copied to the new Gift record as it is on the existing record.

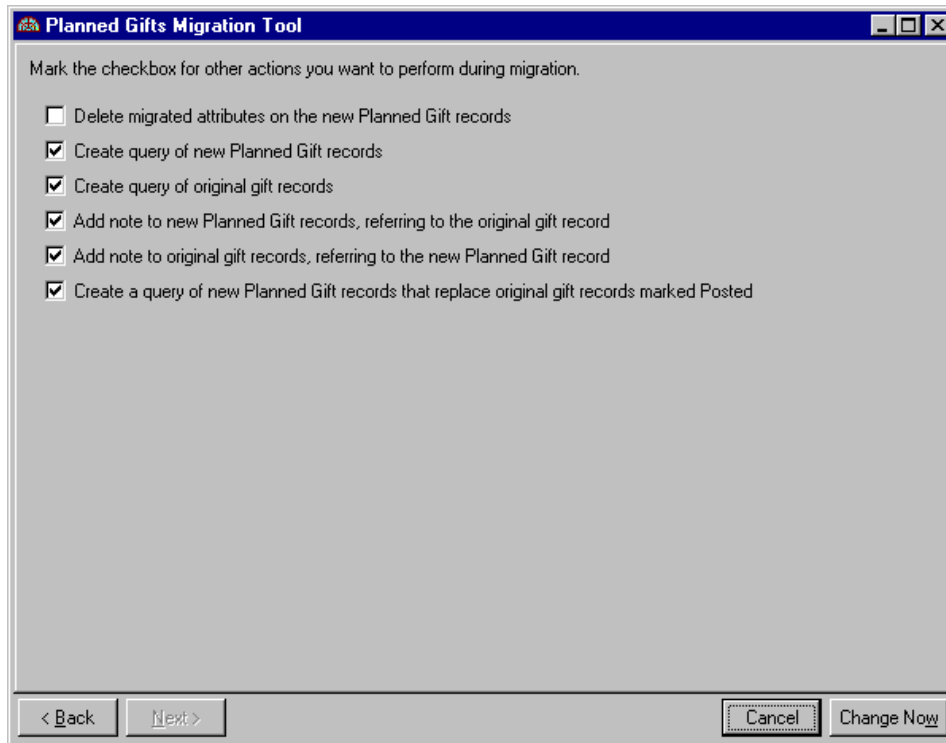
Planned Gift Field	Category	Description
Remainder value		
(Remainder value) As of date		
Planned gift status		
Expected maturity year		
Revocable (checkbox)		
Gift has been realized (checkbox)		
Payout percent		
Payout amount		
Payment frequency		
Discount rate %		
First payment date		
Flexible deferred (checkbox)		
Term type		
Term end date		
Years in term		
Trust tax ID number		

< Back    Next >    Cancel    Change Now

**Note:** Fuzzy dates do not migrate to a new planned gift record. For example, if you used a gift attribute date of "11/25" for November 25, this date does not migrate because it does not contain year information.

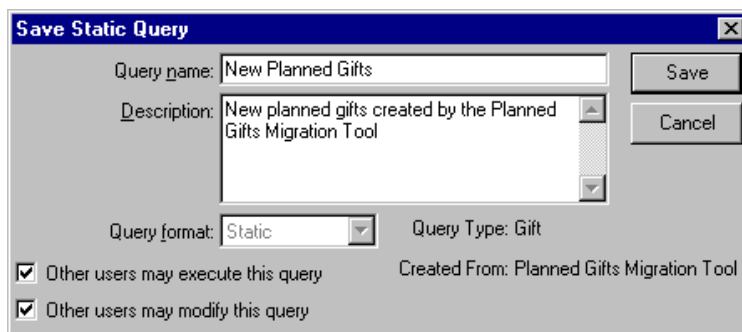
- ☐ The fields in the **Planned Gift Field** column are new fields in *The Raiser's Edge* for planned gifts. In the **Category** and **Description** columns, select the gift attribute for planned gifts information that corresponds to the *Raiser's Edge* fields in the **Planned Gift Field** column.

## Step 3



**Note:** If you are not ready to migrate your planned giving information, click **Cancel** on the Planned Gifts Migration Tool.

- ☐ Read the checkboxes carefully, and mark the checkbox next to the option to perform during migration.
- ☐ Click **Change Now**. If you mark any checkboxes for the query options, the Save Static Query screen appears.



**Note:** For every query you choose to create, a Save Static Query screen appears.

- ☐ If you want, you can write over the default information in the **Query name** and **Description** fields. To limit other users' use of the query, unmark **Other users may execute this query** and **Other users may modify this query**.
- ☐ Click **Save**. The migration begins processing.
- ☐ Once the migration completes, the migration complete message appears. Click **OK**. The Planned Gifts Migration Tool closes, and the PlannedGiftMigration.log file appears. Review the log file to determine any exceptions during your migration.

- ☐ Before you perform a global delete of your original gift records, we recommend you back up your database. For more information about global deletes, see the *Global Add, Delete, and Change Guide*.

## Planned Gifts Migration Tool Exceptions

Because there may be differences between your way of previously storing planned gifts and *PlannedGiftTracker* in **The Raiser's Edge**, some gifts may not migrate. In some instances, a new planned gift record may be created but certain data may not migrate. This table includes a list of possible exceptions and exception reasons.

Exception	Exception Reason
Unable to migrate gift	The gift is not mapped to a <b>Raiser's Edge</b> gift vehicle type. For more information, see "Step 1" on page 57.
Unable to migrate gift	The payment frequency used does not correspond to a <b>Raiser's Edge</b> payment frequency. For more information, see "Step 3" on page 59.
Unable to migrate gift	The term type used for planned gifts does not correspond to a <b>Raiser's Edge</b> term type. For more information, see "Step 3" on page 59.
Unable to migrate gift	The gift does not migrate if the gift is linked to a membership, event, pledge, recurring gift, or a matching gift.
Data from the Stock Details screen and the Sell Stock/Property screen (for a gift record with a gift type of Stock/Property)	Data from these screens on a stock/property gift do not migrate to a planned gift record because fields on these screens are not applicable to a planned gift. To track this information on the new planned gift record, you must manually move the data to the gift fields your organization wants to use to track the stock/property information.



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