In the nonprofit arena, focus is placed on the organization’s mission and on raising the necessary funds to achieve its goals. Further complicating management issues is the fact that successful development offices incorporate gift planning and planned giving as a means of advancing or exceeding fundraising goals, which requires additional time and the need for strong expertise in administration, compliance, investment and donor relations. To meet these challenges to time and resources, PNC Institutional Advisory Solutions® has cultivated its service platform to enable nonprofit organizations to outsource the back office functions of their planned giving program. The result provides the nonprofit with the ability to redistribute workload while increasing comfort with the more complex gifting opportunities.

**Reasons to Outsource**

Today’s donors look for options and opportunities to make their impact on the charitable missions that are important to them. To meet this expectation, the nonprofit organization should focus energy on creating and maintaining strong donor relations, while demonstrating effective stewardship of the gifts entrusted to them. Because of this, we believe there are three categories that support outsourcing planned giving programs (whether it involves charitable gift annuities, charitable lead trusts or charitable remainder trusts):

<table>
<thead>
<tr>
<th>COMMON PROBLEM AREAS</th>
<th>OUR SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>☀ We can be the seamless resource that helps maintain the responsibilities effortlessly and without interruption</td>
</tr>
<tr>
<td>☀ Single person or small back office staff can be disrupted by retirements, illness or departures, causing delays in gift processing, distributions, or even 1099-R and K-1 production.</td>
<td>☀ We offer ongoing access to data, online and hard copy, efficiently and accurately</td>
</tr>
<tr>
<td>☀ Manual Recordkeeping is labor intensive and can be impacted by human error.</td>
<td>☀ Planned Giving administration, for multiple gifting vehicles, is conducted by experienced professionals and is cost effective</td>
</tr>
<tr>
<td>☀ Administration of complex gift strategy and vehicles can be stressful, time consuming and expensive.</td>
<td></td>
</tr>
</tbody>
</table>

*pnc.com/institutionalinsights*
Outsourced Planned Giving Solutions

Our Planned Giving philosophy is that superior investment and administration services are simply not enough in the challenging donor environment. This was our motivation to enhance the platform we offer. Our consultative services are a part of the effective philanthropic relationship we envision for all nonprofits. As an example of this commitment, we offer assistance with education, training and gift planning consultation as an added value feature. We will work with your organization to offer your donors a more thorough understanding of your organization’s charitable mission and articulate the many methods available to make an impact through gift planning and blended giving strategies. Our Planned Giving Service can offer your organization:

- Back office solutions that enable your organization to refocus its skilled professionals on more donor-focused activity, including the cultivation of generational donor relationships.
- A level of confidence that the essential service and compliance components are handled by dedicated experienced professionals. Distributions, recordkeeping/reporting, and the other crucial, but time consuming, duties are handled in an effective, timely fashion.
- Working with us can be very cost effective, demonstrating an emphasis on good stewardship of gifts and contributions to donors.
- We provide experienced professionals who keep current with changes in regulatory and compliance issues that govern the nonprofit community. Because of this, we can help you to stay compliant with the various rules and regulations specific to your organization.
- Our team members are nationally recognized speakers who present on pertinent topics and are available to do internal and external training, as well as a more educational program designed to stimulate donor activity.

COMMON PROBLEM AREAS

Investments
- Different charitable gifting vehicles require specific investment strategies that are compliant with regulations, while simultaneously meeting donor expectations; further, using the same strategy as the endowments for simplicity is not an optimal solution.
- Investment Committees, even with experience in investments, do not always have familiarity with individually investing planned giving programs.

Additional Resources
- Today’s donor can require more assistance with gift planning or the need to understand all facets of complex gift strategy.

OUR SOLUTION

- We offer experience of investment strategists combined with investment advisors who have strong backgrounds in nonprofit regulation.
- Designated Planned Giving investment professionals will meet regularly with your Investment Committee to discuss strategy, performance and customized investment policy statement structure.
- Our consultative services offer education and training, as well as assistance with gift counseling to help enhance donor relationships.

Continued
Planned Giving: Outsourcing Investments and Administration, Focusing on the Relationship

Conclusion

A planned giving program can begin as a reasonable in-house operation, but with growth and over time the program can become a burden and, ultimately, a liability. Outsourcing the labor-intensive components (such as the gift administration of charitable remainder trusts, charitable lead trusts or charitable gift annuities) to PNC Institutional Advisory Solutions and our Planned Giving team can help to reduce these concerns, allowing your organization to focus its efforts on the donors that made it possible.

For more information, please contact your PNC Bank, N.A. representative.

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