



FEATURES

| | PRO | INT |
|---|----------------|----------------|
| GiftLegacy planned giving website with customized branding includes: | | |
| WEEKLY UPDATED CONTENT FOR DONORS— New content to encourage donors to revisit your website | x | x |
| DONOR STORIES— Motivating gift examples and stories from representative donors | x | x |
| ONLINE WILLS PLANNER— Free online, secure wills planning accounts for donors and GiftAttorneys | x | |
| CUSTOM PAGES— Up to eight custom pages (Legacy Society, Endowment Opportunities, etc.) | x | |
| ABOUT ESTATE PLANNING— Videos about wills, bequests, trusts, beneficiary designations and more | x | x |
| CRESPRESENTS— Personalized donor presentations with audio showing the benefits of a gift annuity, deferred gift annuity, unitrust, annuity trust, unitrust and sale, and more | x | x |
| GIFT OPTIONS— An exploration for donors of various planned gifts and the assets that make great gifts | x | x |
| VIDEOS— Informative videos throughout the website | x | x |
| MISSION VIDEO— Custom video featuring your mission | x | |
| NEWS— Custom webpage to keep readers up to date on your organization’s news and events | x | |
| WEEKLY UPDATED CONTENT FOR ADVISORS— IRS regulations, tax cases and revenue rulings | x | |
| GIFTLAW PRO FOR ADVISORS— 30,000+ page charitable tax reference library | x | |
| GIFTLAW DEDUCTION CALCULATOR FOR ADVISORS— Easy-to-use, quick deductions online | x | |
| CUSTOM URL— Short URL to help your donors easily access your website | x | x |
| MOBILE WEBSITES— Custom designed sites for mobile devices | x | |
| Newsletters for Donors (PRO and INT) and Advisors (PRO only). You choose frequency: | | |
| 24/7 BRANDING— Ability to customize newsletters with your organization’s news, events and promotions | x | x |
| ROTATING CONTENT— Washington News, Finance News, Savvy Living and Personal Planner articles updated weekly | x | x |
| EBLASTS WITH EDITOR— Ability to send a message promoting an upcoming event or gift opportunity | x | |
| EMAIL SERVICE— Uses your lists and sends your newsletters, then provides analytics | x | x |
| CresManager System | | |
| WEBSITE PAGE EDITOR— Ability to edit text on specific pages of your website | x | x |
| ELITERATURE PREFERENCES— Ability to customize, upload and select marketing preferences | x | x |
| ONLINE WILLS PLANNER MANAGER— Wills planner accessing and management tools | x | |
| GIFTATTORNEY LIST MANAGER— GiftAttorneys referral list management tools | x | |
| BEQUEST MARKETING SUPPORT— Marketing strategies and support for bequest campaigns (additional fee may apply) | x | x |
| MY PLAN— A complete toolkit with Scheduler and Marketer to assist you in developing a planned gifts marketing plan | x | x |
| CRESPRINT— Online solution for print marketing—the ability to customize files, print and mail | x | |
| CRESLITE— Online version of Crescendo Lite— gift planning proposals on-the-go | x | x |
| GIFTCOLLEGE— Over 100 online planned gifts training courses | x | x |
| BOARD OF DIRECTORS TRAINING— Video courses to educate your boards about planned gifts | x | x |
| GIFTLAW NEWS— Quarterly video series for professional advisor council meetings | x | |
| SOCIAL MEDIA PLATFORM— Social media tools that integrate with your website | x | x |
| STATISTICS AND ANALYTICS— Comprehensive overview of your website activity with donor tracking | x | x |
| FIELD STAFF— Marketing tools for regional staff (\$495 per user) | x | |
| GIFTCHARITY— Branded webpages for your affiliate organizations (\$250 per GiftCharity website) | x | |
| Royalty-free marketing materials | | |
| ESTATE PLANNING GUIDE— A workbook designed to assist donors to create their estate plan | x | x |
| NEWSLETTER— New designs and content quarterly. Customizable using Adobe InDesign | x | x |
| BROCHURES— Hundreds of tri-folds created for your desktop and commercial printing | x | x |
| GIFT BRIEFS— 8 1/2" x 11" flyers on all gift options. Auto-branded and customizable | x | x |
| ADVERTISEMENTS— Standard full page, half and quarter page ads focused on a variety of gift options | x | x |
| POSTCARDS— Oversized postcards with or without a business reply card | x | x |
| INSERTS— Designed to fit in a standard business envelope to accompany letters, invoices, etc. | x | x |
| DESKTOP PRINTING— Marketing collateral auto-branded and ready to print from your desktop printer | x | x |
| Landing Pages— Custom pages to track analytics for campaigns and promotions | x | |
| Marketing, Technical, and Advisor Support | x | x |
| On-going Marketing Seminars and Webinars | x | x |
| Social Media Services | x | x |
| Pro/Plus/Presents Proposal Software | x | |
| PRICE (ANNUAL SERVICE) | \$5,500 | \$3,500 |

Custom Graphic Design, Print and Distribution Services Available— Request Proposal