



WHY PGGROWTH?

No. 1

Planned Giving consulting firm in Canada -
we are LEADERS in Strategic Philanthropy

14 Service and Product Areas

Leading strategic philanthropy services, products - and results

National

presence helping clients from coast to coast

Leading Experts

assisting in the creation of transformational
strategic philanthropy programs

Ed Sluga, CFRE
Co-Founder, President and
Managing Consultant

WE HAVE ALWAYS UNDERSTOOD THAT ANYONE IN YOUR DONOR BASE CAN BECOME A PHILANTHROPIST - YOU JUST NEED TO ASK



Strategic giving through planned - or legacy - gifts is an important part of our fundraising tradition. Each year thousands of individuals support many worthwhile causes by leaving a portion of the assets in their estate to a charity they believe in. **It is an act that defines them and defines the future.**

For many donors these are gifts that may not be financially possible during their lifetime. **Such gifts help people fulfill their charitable dreams. It makes them philanthropists.** Estate gifts also have the additional advantage of generating significant tax benefits for the donor's estate.

Your planned giving program is a legacy for your organization. That statement has never been more true in this new era of asset giving. The skills and expertise necessary to navigate these types of gifts have become an imperative for all charities to acquire and to use.

We are proud to be a unique group of professionals that have significant and unmatched expertise in creating integrated

programs that establish processes today for the future program benefit to your organization. **Planned Giving is our passion. Asset giving is our expertise.** We reason we know that Planned Giving has been evolving. We have helped to change it through our innovative and integrated approaches. It has become an imperative channel of revenue that has pivoted to becoming **strategic philanthropy.**

Your donors wish to support your needs so that your organization can do the work necessary to achieve your mission in the community, the country and the world. **We can help you help them create their strategic gift** to support your charity so that they can become philanthropists.

Ed Sluga, CFRE
Co-Founder, President
and Managing Consultant
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WHO ARE WE?

The only national team of fundraising professionals focusing on planned giving. We have over 400 years of combined Planned Giving experience.

PGgrowth Inc. (PGG) was founded in August 2010 as a partnership between **James Hilborn** and **Ed Sluga, CFRE**. Its initial objective was to provide support to Canadian charities in the stewardship of their donors and supporters to consider naming the charity in their will.

Colleen Bradley and **Doug Puffer** joined the team in 2012; **Ken Ramsay** and **Doug Flanders** in 2014; **Jasmine Sweatman** in 2015; **Tracey Church, Neil Williams,** and **Chris Horne** joined in 2016 and **Colleen DeJager** and **Theresa Butler-Porter** joined in 2017. In 2018 the team was once again strengthened by the additions of **Jane Jamieson, Mary Slavik** and **Nancy Collett**.

In 2019, **Grant Monck** joined as Senior Counsel along with **Janice Meighan** and **Katherine Blake** to round out our team of Senior Consultants. In 2019 PGGrowth was excited to partner with **Barbara O'Reilly** as our U.S. Counsel. In 2020 **Peggy Killeen** joined as our newest Senior Consultant while **Linda Henry** joined as VP, Operations and **Julia Magnuson-Ford** joined as VP, Business Development.

400
years



WHY PGGROWTH?

Our three guiding principles

1

We concentrate on building programs -
not operating tactics (although we are great at that too!)

2

We take a team approach to your program - ALL of our
experts are available to assist with your project

3

Our solutions are focused and customized
to the needs of your organization and your prospects -
one size does not fit all

WHY PGgrowth: The PGgrowth Way

A Legacy Gift connects in some way with the values of the individual

It is a long-term relationship building process with a charitable organization that allows the donor to understand the vision and needs of the charity. A legacy gift reflects the philanthropic desire, financial circumstances and the personal charitable giving objectives of the donor and their family.



We build customized and integrated programs that meet the needs of your organization using our suite of services that focus on program integration



OUR INDUSTRY LEADING SERVICE AREAS

PGreview

An Estate Giving Professional Program Review level-sets your program

PGgrowth has developed a complete and comprehensive seventeen-element review to accommodate all types of organizations at different stages of program development. Three different levels of review are provided for the gaps that may exist and the areas that may require strengthening.

PGcounsel

Experienced and expert guidance to support the engagement of your donor base

The mentoring services provided by PGcounsel can move you on a rapid growth curve from an uncertain fundraiser to a competent and professional gift planner. We'll encourage, instruct, nurture, inspire and support you as you grow and focus on program visibility.

PGmarketing

Setting the stage for gifts through donor cultivation, engagement and inspiration

Communicating that you are worthy of and prepared for legacy gifts is a vital ongoing component of the stewardship process. It is achieved not only through regular stories of bequest donors, but also through articles and reports on how you are putting donors funds to work for the benefit of the larger community. This kind of planning is crucial for successful long-term interaction with your donors to secure Planned Gifts.

PGtraining

Empowering your knowledge and skills to engage your prospects and secure gifts.

PGgrowth has partnered with the creators of the Empowerment Dialogue approach to provide training opportunities to our clients across Canada. These training workshops and seminars guide participants through simple, practical steps of having “empowering dialogues” with prospects and donors making them feel respected and listened to, which can secure current and estate gift commitments.

PGteam

Staffing of your planned giving program from one of our senior consultants taking your program from passive to proactive

On-site senior staffing of your Planned Giving Program from one of our consultants, backed up by the entire cross-Canada PGteam system, can take your program from passive to proactive. Make one of our expert Planned Giving professionals part of your fundraising team for part of the week or month to drive your program forward.

PGcampaign

A well-conducted program will yield conversion rates of 15% to 30% of the targeted prospects reached, giving some level of commitment

Organizations can be confident that their Planned Giving program will catapult forward in a dramatic way. The PGgrowth consulting team is fully equipped to conduct your campaign to the highest ethical and professional standards. Our campaigns win friends for your cause.

PGbuild

Consultation in the creation and fully-integrated and donor-centered planned giving program unique to your organization

Creating and launching a program that will become a legacy to your organization.

PGstewardship

Pledge retention through promoting a positive relationship between donors and your organization

Recognition is a key element of any Planned Giving program. But fundraisers must also view stewardship in the planned giving context as a 'pledge retention' program. Each gift created—known or unknown—is a gift for the future. For most organizations, these pledges are for major gifts.

OUR INNOVATIVE PRODUCTS

PGdatascan

Our industry leading approach to understanding the value of planned gifts in your donor base - unmatched insight into your potential financial future

Your organization's greatest asset in the philanthropic business is your donor database. PGdatascan provides a simple-to-use tool that gives you a list of prospects to engage, thus setting up a highly predictive, estate giving pipeline with clear metrics. The results allow the fundraising professional to build a multi-year pipeline plan to develop full estate gift potential efficiently.

PGestate

Estate administration and management services using a range of up-to-date policies and procedures.

Expert structures and processes to ensure that gifts left to your organization are cared for and maximized to benefit your charitable mission.

PGcycle & PGactivate

Cycle of Cultivation™ Programs

Your Cycle of Cultivation™ Program or Activate™ Program include the following to help 'level set' and launch a fully integrated program. This year-long process includes:

- > review of your current program to establish best practices and ensure integration with the 'donor journey' so the estate giving is an organic element to your development mix
- > cultivation strategy, packaging and implementation for 'community' engagement
- > a solicitation approach to your best potential planned gift prospects
- > technical 'Back Office' support; and on-going consulting throughout. We do all the heavy lifting; you respond to the indications of interest
- > weekly or monthly mentoring sessions with your designated Planned Giving expert from our PGGrowth Team

PGresearch & PGtoolkit

'Back Office' supports for proactive programs

Expert processes and resources to enhance donor identification and organizational processes.



SERVICE AREAS COST

SERVICE AREAS

PGreview	From \$3,200.00 to \$28,800.00
PGcouncil	AS PER PROJECT
PGmarketing	From \$8,800.00
PGtraining	From \$3,000
PGteam	AS PER PROJECT
PGresearch	AS PER PROJECT
PGcampaign	AS PER PROJECT
PGbuild	From \$8,800.00
PGstewardship	From \$7,800.00

INNOVATIVE PRODUCTS

PGdatascan	\$14,800.00
PGinteractive	\$12,800.00
PGestateadmin	\$10,800.00
PGcycle	\$19,800.00
PGactivate	\$9,880.00

ADDITIONAL SERVICES AND PRODUCTS

PGvideo	\$13,800.00
PGtoolkit	\$2,500.00

WHAT OUR CLIENTS SAY



PGgrowth has established a truly sustainable program that provided us with outstanding results to support the future of our school.



RODGER WRIGHT

Advancement and Strategy
Upper Canada College



What working with PGgrowth has provided the NAC is an integrated program of donor engagement that goes beyond simple tactics. It is more than direct mail or telemarketing, it is planned gift pipeline development.



BARRY BLOOM

(Retired) Associate Director, Annual Fund and Planned Gifts, National Arts Centre

