



WHY PGGROWTH?

No. 1

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

Industry Leading 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

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Vancouver | Calgary | London | Waterloo | Toronto | Ottawa | Montreal

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** and **Neil Williams** 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 **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** and **Karen Viersen** joined as our newest Senior Consultants while **Eric Patterson** joined as Campaign Associate. **Linda Henry** joined as VP, Operations and **Julia Magnuson-Ford** joined as VP, Business Development.

Sara Moore and **Doug Flanders** have been our creative team since 2015.



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 COMMITMENT TO YOU

The need for long term commitment

Success in realizing a planned gift generally takes years to achieve. The donor decides when they are inspired and when they will act. This means that inspiring a potential donor, leading them to act and then realizing a gift requires measured and targeted ongoing cultivation over the long term. Understanding donor life stages is the most important aspect to ensuring that the overall cost of securing gifts through this lengthy process is minimized and revenues are optimized. Our proven method of donor cultivation is also the sector's most cost-efficient. The reason for this is simple: while others use the term 'donor-centred' frequently, it is a fundamental principle of our programs, encouraging current and deferred philanthropy for the long-term.

We understand how to work with your development program and available resources

Every organization has limited resources – both in staff time and budgeted costs – for their legacy giving activities. We understand the long-term nature of the process, and we focus on specific targeted donor life stages and enhance the process by overlaying the traditional donor pyramid. We prioritize the relationships that are closest to realization, thus compressing the duration of cultivation and stewardship activities.

We understand that planned giving is a giving opportunity for everyone

The incremental advances in philanthropy that donors make allow us to connect with them when inspiration, donor life stage and advancements through the donor pyramid intersect. A campaign which focuses only on

current gifts can run counter to establishing a program that is inclusive of individual donors who have significant assets but cannot give them during life. These potential philanthropists must be identified and included in the ongoing development continuum to achieve the potential of securing planned gifts.

We understand solicitation is only one step toward a gift

The majority of realized gifts come from donors who were previously unidentified. The ratio for hospital foundations is likely in the range of 6:1. This should be no surprise to anyone who has worked in this field for even a brief period. The big challenge is to develop a welcoming environment which engenders a sense of trust for donors and gives them confidence that their final wishes will be done. When those conditions are both prevalent and become better known, donors will feel more comfortable revealing their intentions and identifying themselves as legacy donors. At that point, the development team can begin to work with them to optimize philanthropic intent. All activities leading to solicitation must focus on relationship enhancement, trust, service, opportunity presentation and donor stewardship.

Why we are different

We are the only cross-Canada consulting team comprised of Canada's most experienced planned giving professionals that mentors professionals, builds program capacity, integrating planned giving revenue, and marketing to engage donors. Our team of career planned giving professionals combined have over well over 400 years of practical experience directly asking donors for gifts and developing successful programs – and we are still doing it today. We know what works!

OUR INDUSTRY LEADING SERVICES

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.

PGreview From \$3,400.00

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.

PGcounsel AS PER PROJECT

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.

PGmarketing From \$5,800.00

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.

PGtraining From \$4,200.00

PGteam

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

Senior staffing of your Planned Giving Program from one of our consultants, backed up by the entire cross-Canada team, 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 advance your program.

PGteam AS PER PROJECT

PGprospect

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.

PGprospect AS PER PROJECT

PGcapacity

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.

PGcapacity From \$8,800.00

“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

OUR INNOVATIVE PRODUCTS

PGestate

Estate administration and management services

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

PGestate Training

From \$2,800.00

PGestate Management Services

From \$8,800.00

PGresearch

‘Back Office’ supports for proactive programs

Expert processes and resources to enhance donor identification and gift level targeting. True strategic philanthropy required knowledge and understanding of your donors and their capacity to give.

PGresearch AS PER PROJECT

PGdata

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 - our premiere analysis tool -

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.

PGdonorscan is our process of focusing on your current donors to identify the best prospects for your program. Less extensive than PGdatascan, the PGdonorscan can provide an initial advancement of your program for identified ‘quick wins’.

PGdata

PGdatascan	\$15,200.00
PGdonorscan	\$6,200.00

“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

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

For service or product pricing, please contact us at
info@poggrowth.com or call 833-937-4438

SELECTED CLIENT LIST

