

Catalog of Booklets



"[Our customized booklet] is so beautiful. In fact, I'm going to check on submitting it for a CASE publication award because we are so pleased with it."

—Kenzie Thompson
The University of Massachusetts at Amherst

35 years of planned-giving marketing experience!

Relationship Builders

Move your donors to the next level

Top planned-giving departments and small shops, allied professionals, accounting firms, financial planners, and banks across the country use Pentera booklets and consider them to be an invaluable tool.

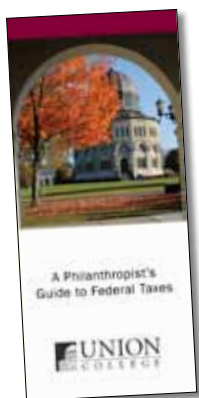


Functioning as follow-up materials to an inquiry or a conversation, booklets can motivate potential donors to begin a relationship or move an existing relationship with you to the next level.

Each option in our extensive library of topics helps you explain how various creative charitable-giving options benefit both your potential donors and your organization.

Comprehensive yet easy-to-understand explanations help educate potential donors and consequently build the credibility of the planned-giving officer and the department.

Gift Planning Guides



Updated annually. Good through April 15. **A Philanthropist's Guide to Federal Taxes** explains tax laws that affect charitable strategies, including gift annuities and CRTs, that can reduce taxes and maximize income. This handy, information-packed handbook appeals

to both readers and visually oriented people, with lots of examples, charts, and graphs. (015)

Ways to Give is a concise gift-planning primer outlining the benefits of charitable giving, including gifts to fund the future: Outright gifts and deferred gifts—CRUTs, retirement-income unitrusts, flip unitrusts, CRATs, lead trusts, CGAs, sample bequest language and discussion, testamentary IRA gifts, gifts of homes, and life insurance gifts. (038)

If your organization does not offer CGAs: **Planned Giving: Options and Opportunities** is similar to **Ways to Give**; excludes gift annuities. (006)

36-page handbook. **A Guide to Creative Gift Planning Arrangements** Classic gift-planning techniques are explained in lucid detail and illustrated with clear, practical, and relevant examples and illustrations for each situation. (027)

Estate Planning

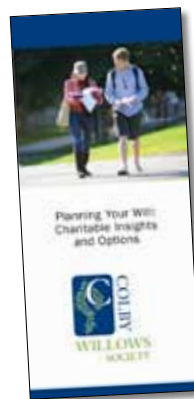
Meeting Family Needs While Satisfying Philanthropic Desires highlights several unique ways that effective charitable planning can enhance family financial security and promote a tradition of family philanthropy. (017)

Updated annually in August. **Effective Year-End Tax Planning with Charity in Mind** deals with a variety of ways to maximize income and reduce taxes. New title and copy each year; highlights the most appropriate gift plans annually. (020)

Estate and Charitable Planning for Today's Woman looks closely at the concepts of jointly held property, the unlimited marital deduction, and the use of the charitable remainder trust as a planning tool for women. Illustrates how careful planning can diminish the bite of federal estate tax on jointly owned property and on a single woman's estate. (021)

7 Charitable Tax-Wise Moves You Can Make Now (026)

Wills, Bequests, & Revocable Trusts



Planning Your Will: Charitable Insights and Options underscores the basic planning opportunities available with a carefully drawn will. Discusses in detail such topics as charitable bequests, testamentary charitable lead trusts, and contingent bequests.

An excellent introduction to wills and bequests. (002)

★ Booklet Spotlight

A Personal and Charitable Financial Record provides your donors and prospective donors with an efficient means of recording vital statistics, financial information, insurance, investments, location of important papers, etc. Includes strategically placed illustrations of charitable examples. An excellent tool to help your donors focus on preparing their wills and estate plans. (025C)
Larger size available, call for quote.

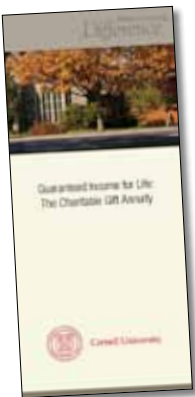


Planning Your Will for All It's Worth discusses the relationship of the will to the overall estate-planning or settlement process, the added value of planning with trusts, and the use of QTIP arrangements to meet charitable objectives. (003)

Your Will and Other Ways to Transfer Assets looks at how to control the tax bite on the transfer of assets to others. Discusses how to reduce one's gross estate and use the marital deduction, exemption-equivalent credit, and planned gifts to the best advantage. (031)

Ensuring Your Wishes: A Guide to Your Will explains the strengths and limitations of this document. Describes how to meet goals while avoiding unnecessary taxes. (043)

Life-Income Plans



Guaranteed Income for Life: The Charitable Gift Annuity highlights the benefits of a gift annuity in simple Q&A format. Among the questions: How is the annuity income determined? How is the income taxed? (004) (Three versions available, including one without rate tables.)

The Charitable Gift Annuity: 12 Ways It May Benefit You briefly describes various ways the popular and versatile gift annuity can benefit the donor and provide valuable support for your mission. (008)

Augment Your Retirement Security: The Deferred-Payment Gift Annuity explains this concept and includes charts that demonstrate how income and tax deductions increase with longer deferral periods. (030)

5 Trusts to Meet Your Financial and Philanthropic Goals (034)

Enhance Your Financial Security with Effective Use of Charitable Remainder Trusts explains, through understandable language and examples, the features and benefits of these gift vehicles. Includes charts that illustrate charitable deductions based on age and payout rate. (036)

The Charitable Lead Trust: A Cost-Effective Method of Benefiting Charity—Then Your Heirs uses a Q&A format to describe the charitable lead trust. Diagrams show how this gift vehicle works, with tables about the percentages of the gift deductible in different scenarios. (044)

Specific Planning

Life Insurance: A Flexible Asset (005)

How to Realize Maximum Benefits from Your Real Estate looks at how planned giving can lessen the impact of the liquidity crunch. Explains gifts of undivided partial interest, remainder interest, and reserving a stream of income. (007)

Planning for a Secure Retirement: Charitable Options highlights several solutions to help your prospects reach their retirement objectives through charitable giving, whether accumulating for the future, increasing current retirement income, or planning for the disposition of remaining funds. (047)

Giving Appreciated Property: How to Get the Most Out of It shows clearly why it is often better to give appreciated property rather than cash. Discusses outright gifts of securities, real estate, and tangible personal property. This is a good booklet for upscale prospects and

special target mailings such as year-end promotions. (037)

Charitable Tax Planning with Retirement Funds discusses the various taxes that may consume retirement funds remaining at the owner's death and explains charitable plans that can lessen the tax bite while providing for heirs and charity. (049)

Distributions from IRAs and Qualified Retirement Plans explains how retirement-plan distribution rules have been modified and offers suggestions about using IRA and qualified retirement-plan funds to meet family philanthropic objectives. (050)



Estate Planning for Physicians, Including Charitable Options addresses benefits of the estate-planning process for this unique group of prospects and donors. Discusses gift-planning strategies to help a physician incorporate philanthropy into his or her estate plans. Easy to understand and to the point. *Quick read, but concise.* (053)

Financial Planning

Mutual Funds and Your Charitable Options describes how the concept works, how mutual funds are taxed, and why they can be good for funding charitable gifts. (040)

Charitable Solutions to Investment Dilemmas (042)

Ways you can use Pentera's booklets

- Handouts during visits with donors and prospects
- Follow-up response pieces to mailings or telephone solicitations
- Educational tools for board meetings, volunteer training, and on-site seminars
- Targeted mailing pieces to select groups of your audience (**Estate Planning for Physicians** to doctors, **Estate and Charitable Planning for Today's Woman** to female donors and prospects, etc.)

✉ Let Pentera mail your booklets

Are you planning a direct mail campaign using a Pentera booklet? Ask about using our mailing service to save the shipping cost of having the booklets sent to you—and the time it takes to coordinate the mailing. Ask for a complete mailing package sample.

Pentera's Planned-Giving Booklets: Customization Options



Option 1: Basic booklet with customized cover

Provide your logo, photo, seal, mission statement, contact info, etc., for the front and back covers. Our designers create (or work with you to create) a custom look to blend with your other publications or branding requirements.

Option 2: Booklet customized throughout

Please call for samples and a quote for fully customized booklets (your choice of photos and artwork, paper stock, fonts, booklet dimensions, number of pages, etc., included in pricing).

Pricing

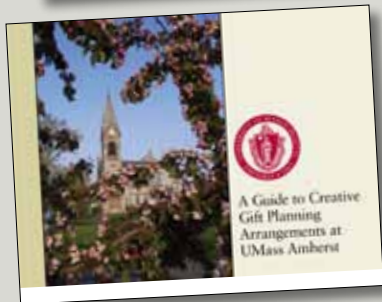
For pricing please contact Molly Donikian
molly@pentera.com
317-875-0910, ext. 231

Are You Ready to Order?

E-mail logos, photos, graphics, contact information, mission statement, etc., to molly@pentera.com.

A Guide to Creative Gift Planning Arrangements

A comprehensive planned-giving handbook for your donors



Our 36-page, 6" x 9" guide:

- is completely revised and updated for all recent tax laws.
- discusses how to plan in view of the uncertainties surrounding the fate of the estate tax.
- explains, in straightforward, easy-to-understand language, the various gift planning vehicles, with realistic applications and charts.
- includes a detailed section about the timing of charitable gifts for maximum tax advantage.
- allows your choice of custom-cover design at standard pricing.
- provides your donors, board members, and allied professionals with an extensive reference at their fingertips.
- can be used as a leave-behind piece after personal visits with donors, given out at seminars or staff training sessions, and sent to the allied professionals who advise your donors.

To order the **Guide**, simply provide the appropriate information requested on the order forms; or call, e-mail, or fax us.

Note: In the event of tax-law changes that render your inventory of the **Guide** out-of-date, **Pentera** will replace your inventory at two-thirds of the unit cost you paid, effective for six months from the date we shipped your order.

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Call for Pricing

For pricing please contact Molly Donikian at molly@pentera.com.

- Minimum order of 100.
- We will mail you an invoice upon shipment of your order.

Custom Covers

Provide your logo, photo, seal, mission statement, contact info, etc., for the front and back covers. Our designers create (or work with your designers to create) a custom look to blend with your other publications or branding requirements.

Additional Custom Features

We can also produce the **Guide** with *custom features* (covers, size, colors, text, etc.). Please call for a quote.

Call for samples...
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NUMBER	TITLE	LENGTH*	QUANTITY
	General Gift Planning Guides		
006	Planned Giving: Options and Opportunities		
015	A Philanthropist's Guide to Federal Taxes (updated annually)	16p	
038	Ways to Give	16p	
	Estate Planning		
014	Charitable Planning for Singles		
017	Meeting Family Needs While Satisfying Philanthropic Desires		
020	Year-end charitable planning topic (new booklet annually) 12 or 16 pages		
021	Estate and Charitable Planning for Today's Woman		
026	7 Charitable Tax-Wise Moves	16p	
048	Your Charitable Gift Need Not Be Taxing	16p	
054	Planned Giving Opportunities: Questions and Answers About the New Tax Law		
	Wills, Bequests, and Revocable Trusts		
002	Planning Your Will: Charitable Insights and Options	16p	
003	Planning Your Will for All It's Worth		
028	The Living Trust: A Trust for Life		
031	Your Will and Other Ways to Transfer Assets		
035	Planning Your Will with Trusts		
043	Ensuring Your Wishes: A Guide to Your Will		
	Life-Income Plans		
004	Guaranteed Income for Life: The Charitable Gift Annuity <i>Choose one version:</i> <input type="checkbox"/> The popular "rateless" version <input type="checkbox"/> Minimum gift examples: \$10,000 <input type="checkbox"/> Minimum gift examples: \$25,000		
008	The Charitable Gift Annuity: 12 Ways It May Benefit You	16p	
009	Gift Planning Opportunities with Lifetime Trusts		
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030	Augment Your Retirement Security: The Deferred-Payment Gift Annuity		
034	5 Trusts to Meet Your Financial and Philanthropic Goals		
036	Enhance Your Financial Security with Effective Use of Charitable Remainder Trusts		
044	The Charitable Lead Trust: A Cost-Effective Method of Benefiting Charity—Then Your Heirs	16p	
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C101	Gifts by Canadians to American Colleges and Universities		
027	A Guide to Creative Gift Planning Arrangements	36p	

*Booklets are 12 pages in length, including covers, unless noted otherwise.

Please send me:

Three free PDFs or samples. *(Indicate choices above.)*

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