



## Stop Reading This Now!

### PG Calc Featured Article, January 2024 eRate

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You read that correctly. If it is still December 2023 and you are reading this, put it aside immediately. If not, Happy New Year! Glad you remembered to come back to read this in 2024.

If you did keep reading, why on earth would we tell you to stop reading the latest in planned giving updates and information? After all, it is important to stay up to date with the latest in planned giving, isn't it? Elsewhere in this edition of our eRate you'll read our year-end reminders and information about the increase of gift annuity rates effective January 1, 2024.

Except for a couple of timely updates, for everything there is a season. As we head into the end of 2023, your job is to raise as many gifts as possible.

- Have you contacted everyone that made a QCD last year that hasn't done one in 2023?
- How are you doing on all of your outstanding proposals?
- Have you made all of your stewardship calls for the year?
- Do you have a plan to process those last-minute stock and QCD gifts?
- Have you reminded your prospects that this year's calendar is going to be especially challenging because the last trading day will be Friday the 29th even though the tax year doesn't end until Sunday the 31st?

We hope all of our clients had a successful year of fundraising and an enjoyable 2023. Happy Holidays to everyone, and we'll see you back here in 2024.