



FEATURES

GIFTLEGACY PLANNED GIVING WEBSITE WITH CUSTOMIZED BRANDING INCLUDES:	PRO	INTERMEDIATE
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
CRESWILLS—Online creation for personalized will document	x	
CUSTOM PAGES—Up to three custom pages (Legacy Society, Endowment Opportunities, etc.)	x	
ABOUT ESTATE PLANNING—Videos about wills, bequests, trusts, beneficiary designations and more	x	x
DONOR PROPOSALS—Personalized donor proposals showing the benefits of popular gifts	x	x
GIFT OPTIONS—An exploration for donors of various planned gifts and the assets that make great gifts	x	x
VIDEOS—Informative videos on how and what to give throughout the website	x	x
MISSION VIDEO—Custom video featuring images and footage of your mission in action	x	
NEWS—Custom webpage to keep readers up-to-date on your organization's news and events	x	
WEEKLY UPDATED CONTENT FOR ADVISORS—Relevant IRS regulations, tax cases and revenue ruling	x	
GIFTLAW PRO FOR ADVISORS—Thousands of pages of charitable tax reference materials	x	
GIFTLAW DEDUCTION CALCULATOR FOR ADVISORS—Easy-to-use, quick charitable deductions online	x	
CUSTOM URL—Short URL to help your donors easily access your website	x	x
MOBILE-FRIENDLY WEBSITES—Websites optimized for desktop computers, tablets and phones	x	x
DYNAMIC WEBSITE WIDGETS—Streamline donor giving with dynamic website widgets for donor advised funds (DAFs), IRA rollover gifts and beneficiary designation gifts	x	x
NEWSLETTERS FOR DONORS (PRO AND INT) AND ADVISORS (PRO ONLY). YOU CHOOSE FREQUENCY:	PRO	INTERMEDIATE
BRANDING—Ability to customize newsletters with your organization's news, events and promotions	x	x
NEW CONTENT—Tax, finance and personal planning articles updated weekly	x	x
EBLASTS WITH EDITOR—Ability to send unlimited email messages promoting events and gift opportunities	x	
EMAIL MANAGEMENT—Ability to create and send emails to multiple segmented lists	x	x
CRESMANAGER SYSTEM	PRO	INTERMEDIATE
ELITERATURE PREFERENCES—Ability to customize and upload marketing pieces	x	x
ONLINE WILLS PLANNER MANAGER—Wills planner access and management tools	x	
BEQUEST SUPPORT—Marketing strategies and support for bequest campaigns	x	x
MY PLAN—Tools to assist you in developing a marketing plan	x	x
CRESI AI—Create personalized, meaningful content specifically tailored to your donors	x	
CRESPRINT—Online print marketing software—create, print and mail fully customized literature	x	
MASTER GIFT CASE—Create your case statement for major gifts	x	
SOFTWARE—GiftLegacy Pro includes two seat licenses for CresPro software and Intermediate includes two seat licenses for CresLite software (additional licenses extra)	x	x
CRESSURVEY—Tool to gather information and encourage donors to make and report gifts	x	
CRESLEADER—Dashboard to manage your user accounts	x	x
GIFT ANNUITY MARKETER—Create persuasive two-page color proposals that show your donors the benefits of a charitable gift annuity. Send to two or 10,000 donors and close repeat gift annuities	x	
GIFTCOLLEGE—Online planned giving education program with over 100 videos	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
MARKETING & WEBSITE ANALYTICS—Comprehensive overview of your website activity, donor engagement tracking, monthly donor dashboard reports	x	x
ROYALTY-FREE MARKETING MATERIALS	PRO	INTERMEDIATE
ESTATE PLANNING GUIDE—Custom-branded workbook designed to assist donors in creating their estate plan	x	x
NEWSLETTER—New quarterly designs and content	x	x
BROCHURES—Hundreds of brochures created for 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—Postcards and extended postcards with or without a business reply card	x	x
INSERTS—Designed to fit in a standard business envelope.	x	x
DESKTOP PRINTING—Marketing pieces auto branded and ready to print from your desktop printer	x	x
MISCELLANEOUS	PRO	INTERMEDIATE
LANDING PAGES—Custom pages to track analytics for campaigns and promotions	x	
MARKETING, TECHNICAL, AND ADVISOR SUPPORT	x	x
ONGOING MARKETING SEMINARS AND WEBINAR	x	x
CRESOACHING—Personalized coaching to develop and launch your marketing plan	x	x

Custom Graphic Design, Print and Distribution Services Available—Please request a proposal