

GIANT, IMPORTANT DISCLAIMER: WE AREN'T GIVING LEGAL, TAX OR FINANCIAL ADVICE. PLEASE SEEK YOUR OWN COUNSEL FOR ANY DONATIONS. MANY OF THESE QUESTIONS ARE OPEN TO SOME INTERPRETATION, ARE GENERAL IN NATURE OR ARE UNIQUE TO A PARTICULAR JURISDICTION. ASSUME ALL ANSWERS ARE WRONG UNTIL YOU/YOUR DONOR CONFIRMS WITH HER/HIS ADVISOR.

**Q & A from “More than Just Words: Leveraging AI for Research, Calculations & Illustrations in Advanced Charitable Planning”
<Oct, 2025>**

How are we dealing with/managing donor disdain for AI tools?	Do you have any specific scenarios? This AI provides specific research for advisors/charities as well as a summarized response for donor queries.
At some point in the presentation, will you be sharing pricing information on this product? How does it compare to Crescendo in pricing and effectiveness?	Yes, but it isn't specifically meant to replace some of the software calculation systems. But if you are a CGP member, there is a major discount as a member benefit, which will be discussed.
What's the maximum number of lives the charitable deduction calculators will allow? For example, for a PIF, PG Calc will allow 10 lives. Kallina's Charitable Planning.Com will allow 15 lives.	<p>Currently, the Gift Planner's Workstation does not yet include calculators for split-interest gifts such as charitable remainder trusts, charitable gift annuities, or pooled income funds. These require complex IRS-defined actuarial computations that we are currently integrating. Calculators for these instruments will be available soon—either powered directly by AI or as traditional static online tools.</p> <p>The first phase of our calculator suite focuses on the other 90 percent of illustrations that gift planners need every day, such as estimating the income tax savings from a qualified charitable distribution, the benefit of donating appreciated non-cash assets, or the comparison of gifting versus selling property.</p>

<p>What does the Gift Planners Workstation cost? Is it a monthly or annual subscription? If there are multiple users within a firm, must each user have their own subscription, or is there a "master" subscription?</p>	<p>The Gift Planner's Workstation is \$499 per year for individual users. Frank for Advisors and Max for Donors are each \$999 per year, or \$1,499 for access to both. Members of the National Association of Charitable Gift Planners receive a 25 percent discount on these subscription prices.</p> <p>Each user must have their own login credentials, but when two or more users from the same organization subscribe, we review those cases individually and offer discounted pricing depending on the number of seats being purchased.</p>
<p>It sounds like the tools we're discussing today might be an appropriate replacement for Crescendo rather than a supplement. Am I missing something?</p>	<p>The Gift Planner's Workstation is not intended to replace Crescendo or PG Calc. Those programs specialize in calculating and generating the legal documents for traditional split-interest gifts and have done so effectively for decades. The Workstation is designed to complement, not compete with, those systems.</p> <p>Our calculators and illustrations address the broader range of everyday planning scenarios that represent roughly 90 percent of donor conversations—cases that do not involve charitable remainder trusts or gift annuities, PIFs, RLEs. These include instead scenarios such as undivided real estate gifts, qualified charitable distributions, "virtual endowments".</p>
<p>\$374 one-time or annually?</p>	<p>So long as you are a National CGP member, your recurring annual membership would always include the 25% discount. So yes, it would be \$374 annually for the Workstation.</p>