

Donor Proposal Software Comparison

Our cloud software offers a variety of gift proposals targeted at specific donors. Crescendo provides three service levels of donor proposal software: CresPro (comprehensive software), CresEstate (mid-level software) and CresLite (basic software). These software products are cloud-based. The comparison table below shows the gift programs offered by each version of our cloud software:

FEATURES

GIFTLEGACY PRODUCT MATRIX

PLANNED GIFT PROGRAMS:	CRESPRO	CRESESTATE	CRESLITE
Annuity Trust - One or Two Lives	X	X	X
Annuity Trust - Term of Years	X		
Bequest/Bequest of IRA	X	X	
Education Unitrust	X		
Gift Annuity - One or Two Lives	X	X	X
Gift Annuity for Home	X		
Gift Annuity - Deferred (Flex Deferred)	X		X
Gift Plus Insurance	X	X	
Gift and Redemption	X		
Life Estate Reserved	X		
Living Lead Trust	X	X	
Pooled Income Fund	X		
Retirement Unitrust, NIMCRUT, FLIP CRT	X	X	X
Revocable Trust	X		
Sale vs. Unitrust	X	X	X
Testamentary Lead Trust	X	X	
Testamentary Unitrust/Gift Annuity	X	X	
Unitrust - Term of Years/FLIP	X		
Unitrust - Life Plus Term	X	X	
Unitrust and Insurance Trust	X	X	X
Unitrust - One to Eight Lives	X	X	X
Unitrust and Sale	X	X	X
BLENDING GIFT PROGRAMS	CRESPRO	CRESESTATE	CRESLITE
Current Gift and Bequest	X		
Endowed Gift and Bequest	X		
IRA Gifts and Bequest	X		
IRA Gifts and Testamentary Unitrust	X		
Current Gift and Gift Annuity	X		
Current Gift and Deferred Gift Annuity	X		
Gift Annuity and Bequest	X		
Gift of CGA Interest and Bequest	X		
Current Gift and Unitrust	X		
Gift of Unitrust Income Interest and Bequest	X		
Lead Trust and Bequest	X		
Current Gift and Testamentary Lead Trust	X		
MAJOR GIFT PROGRAMS	CRESPRO	CRESESTATE	CRESLITE
Bargain Sale	X		
Cash Gift	X		
Gift of Appreciated Asset	X		
Gift and Sale	X		
IRA Rollover Gift	X		

(continued on the next page)

Donor Proposal Software Comparison (cont.)

FEATURES

GIFTLEGACY PRODUCT MATRIX

WORKSHEET PROGRAMS	CRESPRO	CRESESTATE	CRESLITE
Unitrust - Life Plus Term	X		
Annuity Trust - One or Two Lives	X		
Annuity Trust - Three to Six Lives	X		
Annuity Trust - Term of Years, QPRT, GRAT	X	X	X
Gift Annuity - One or Two Lives	X		
Gift Annuity For Home	X		
Gift Annuity - Deferred	X		
Lead Trust - Term of Years	X	X	
Lead Trust - One or Two Lives	X	X	
Life Estate Reserved	X		
Pooled Fund	X		
Unitrust - One or Two Lives, GUAR, MAX, GRUT	X	X	X
Unitrust - Three to Ten Lives	X	X	
Unitrust - Term of Years	X		
Present Value - Unitrust	X		
Present Value - Gift Annuity	X		
MISCELLANEOUS	CRESPRO	CRESESTATE	CRESLITE
Gift Analyzer	X	X	X
Annuity Rates - One or Two Lives	X	X	X
Gift Annuity Marketer (part of CresLeader)	X		
Life Expectancy - One or Two Lives	X	X	X
Estate Tax Calculator	X	X	X
Income Tax Rate Calculator	X	X	X
Capital Gains Tax Rate Calculator	X	X	X
IRA Required Minimum Distribution Calculator	X	X	X
Loan Calculator	X	X	X
Present Value Calculator	X	X	X
Bequest Present Value Calculator	X	X	X