

Release Notes for *PGM Anywhere*

Release Date: 1/17/2018

Enhancements

- **Proposal Letter and description narratives updated to mention 60% AGI limit on cash gifts**
The Tax Act of 2017 increased the amount a donor can deduct for gifts of cash to public charities from 50% of adjusted gross income (AGI) to 60%. The Proposal Letter, Description and/or Example, Long Description and/or Example, and Comparative Description narratives give you the option to include information about the % of AGI deduction limitations. Where applicable, this optional text now references the 60% of AGI limitation on gifts of cash.
- **Revised disclosure language for NM and VA to match language in state statutes**
We have replaced "This charitable gift annuity" with "A qualified charitable gift annuity" in the disclosure paragraph that appears at the top of NM gift annuity agreements and with "A qualified gift annuity" in the disclosure paragraph that appears at the top of VA gift annuity agreements. *PGM* clients will not need to refile any prototype agreements as a result of these changes.
- **Help expanded and updated for Tax Act of 2017**
We have added numerous federal tax tables to *PGM Anywhere* Help. All of them are current with the Tax Act of 2017. See *Help > Contents > Tables > Federal Income Tax* and *Help > Contents > Tables > Federal Gift and Estate Tax* to review all of these tables. See *Help > Contents > Tax rulings > Tax Act overviews* to read an overview of the Tax Act of 2017 and its implications for charitable giving. The new *Contents > Tax rulings* section also includes the full text of 55 tax rulings over the past 30 years that are relevant to gift planning.

Known Issues

Deduction wrong for grantor lead trusts funded with short term gain or ordinary income property

The charitable deduction computed for a grantor lead trust funded with short term gain or ordinary income property is based on the value of the property transferred rather than the donor's cost basis in the property. This set of facts is highly unlikely to arise in practice, but we will fix this issue in the next release.

Age Differences on PGMA Release 5 Presentations vs. PGM 7.4 Presentations

On several presentations for deferred gift annuities (DGAs) and a few for flexible gift annuities (FGAs), PGMA Release 5 shows the age of the annuitant as of the annuity starting date whereas PGM 7.4 shows the age of the annuitant as of the date of first payment. For example, when a DGA is shown on the Comparison of Benefits chart in *PGM Anywhere*, the age shown in the DGA column heading is based on the annuity starting date, but in *PGM 7.4* it is based on the date of first payment. We expect to resolve this discrepancy between the two products in future releases.

<BEQUESTORNAME> is not replaced when narrative includes sample bequest language

You can set up sample bequest language under Customize > Organizations > Bequests. If you include "<BEQUESTORNAME>" in your sample language, your entry for "Identify organization in bequest language as" is supposed to replace "<BEQUESTORNAME>" when the sample bequest language appears in a narrative. Instead, "<BEQUESTORNAME>" appears.

To resolve this issue in Release 5, go to Customize > Organizations > Bequests and replace all occurrences of "<BEQUESTORNAME>" with the organization name as you want it to appear in sample bequest language.

Browser-specific issues with Help

In Chrome on a Macintosh, searching the Index by entering a keyword does not work. This feature works as expected in Safari on a Macintosh.

In Chrome on a computer running Windows, once you open a help topic, you cannot open a book in the table of contents without first closing and reopening Help. This issue does not occur in Firefox on Windows computers.

The Search feature does not work on any browser we have tested.

"Font is not available. Select another font from the list"

This message appears when you attempt to select a different font (while viewing Results) if the requested font is not resident on the device on which you are running *PGM Anywhere*.

In Firefox on a Samsung Galaxy (an Android-based tablet), this message appears anytime you attempt to change the font, regardless of whether the font is resident on your device. In this case, try changing the font while running *PGM Anywhere* in a different browser or on a different device.

Field value doesn't highlight when tapped on an iPad

This is standard browser behavior on the iPad. There is an expectation that tapping a field will highlight the entire field in future versions of Chrome and Safari.

User must click Done twice to make action occur

In Firefox only, there are some actions that can be completed only when you tap twice in a row rather than the usual once. The solution is either to tap twice in these situations or to run *PGM Anywhere* in a different browser. Instances where this happens include:

- If you edit a Gift Annuity or Deferred Gift Annuity gift option, typing in new date of first payment for GA or DGA under Gift Options requires clicking Done twice.

- When you edit or add a Pooled Fund or Disclaimer under Customize and click Done
- When you change the gift date or birth dates in the Date - Lives – Term window and then click another item in the left navigation bar, such as Results, you have to click twice in the left navigation bar to move on. This behavior occurs when you type your date change into the field, but not if you use the calendar control to revise the date.

Disclaimer text is cut off on the right

Disclaimer text can get cut off on the right when the font is too big. Try reducing the font size. Choosing a different font without changing the size might also help.

Calendar control does not display numbers for the days

We have seen this behavior on one machine when running *PGM Anywhere* in Internet Explorer 9. Try running *PGM Anywhere* in a later version of Internet Explorer or a different browser.

Results doesn't work on iPad 1

We have found that *PGM Anywhere* hangs up indefinitely when you run it on an iPad 1 (the original iPad) and tap Results. Try running *PGM Anywhere* on a different device: a later version of the iPad, on an Android-based tablet, or in a laptop or desktop browser.

iPad sometimes doesn't display second age in Date-Lives-Term window

If you are working on an iPad and enter a second age or birth date in the Date-Lives-Term window, open a different window (tap Results, for example), then open Date-Lives-Term again, the second age/birth date is not visible. If you then tap Results, the second age will still appear on the chart and the calculations will be based on two ages.

In the case of entering birth dates, the second birth date disappears as described only if you type in the complete birth date. If you use the date control to enter the birth date or enter the birth date in mm/dd/yy format rather than mm/dd/yyyy format, the date will not disappear when you leave and then return to the Date - Lives- Term window.

Printing requires PDF download on some browsers

When you choose print in the Results screen, a PDF should open in your browser window and the print dialog should appear. In some browsers, such as FireFox in our testing, the browser instead treats the PDF file as a download. In order to finish sending the print job to the printer in this situation, you will need to go to the downloads screen in your browser and open the file, at which point the print dialog should appear.