Release Notes for *PGM Anywhere*
Release Date: 1/16/2019

Enhancements

Federal income tax schedule for estates and trusts in 2019
The federal income tax table for estates and trusts is used when projecting the income tax owed by a non-grantor lead trust each year. The federal income tax schedule for estates and trusts for 2019 has been added for this purpose. This income tax schedule is also used to determine when to apply the 3.8% Medicare surtax to a non-grantor lead trust's taxable income (this threshold in 2019 is $12,750 of taxable income).

Tax tables in online Help updated for 2019
PGM Anywhere Help includes numerous federal income, estate, and gift tax tables for reference. Where appropriate, these tables have been updated to include indexed values for 2019. See Help – Contents – Tables – Federal Income Tax and Help – Contents – Tables – Federal Gift and Estate Tax to review these tables.

Revised Gift Annuity Disclosure Statement narrative for Alabama
Alabama regulators have asked that gift annuity disclosure statements either affirmatively state that a charity has "no present, pending, or threatened legal proceedings to which the charity or its property is or may become a party," or describe such proceedings. The Gift Annuity Disclosure Statement now can handle both situations for Alabama statements. Previously, it did not include any information about legal proceedings and required you to add this language by editing the statement in Word.

Issues

Age differences on *PGM Anywhere* presentations vs. *PGM* desktop *p*resentations
On several presentations for deferred gift annuities (DGAs) and a few for flexible gift annuities (FGAs), *PGM Anywhere* shows the age of the annuitant as of the annuity starting date whereas *PGM* desktop 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* desktop it is based on the date of first payment. We expect to resolve this discrepancy between the two products in future releases.

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.

Flexible gift annuity values could be slightly positive instead of $0
In the unusual case of a two-life flexible gift annuity funded with appreciated property where the reportable capital gain was reported over one life and was great enough to crowd out all tax-free income, a small tax-free amount could be shown rather than $0. A $0 tax-free amount is now shown in this situation.

"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.

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.