

Roadmap for *PGM Anywhere* from 10/2019 Onward

Current *PGM Anywhere* Capabilities

- Deduction calculations for all standard gift types based on 1-2 lives or a fixed term
- Taxation calculations for gift annuities, deferred gift annuities, flexible gift annuities
- Calculations for gifts funded with cash, long term gain, short term gain, or ordinary income property
- Projection of planned gift benefits based on investment assumptions and tax rates
- Compare up to three planned gifts and keeping or selling and reinvesting the gift asset
- Gift annuity agreements for all 50 states and all other narratives available in PGM
- Present Value, Future Value, Life Expectancy, and PV of Future Bequest tools
- Nearly 40 templates
- Produce charts, graphs, diagrams, and narratives
- Export presentations to Word, PDF, or Excel
- Designer Proposals brochure-style presentations (optional module)
- “Tech” role w/limited access that does not count against # of licenses

Features in *PGM Anywhere* Not Available in *PGM (Desktop)*

- Works on Mac, Windows, and Tablets. Works on phones, too, but UI is not optimized for small screens
- Export presentations to PDF
- Email presentation PDFs to donors/advisors
- Drag and drop presentations into any order
- Store saved cases in searchable database
- Security features to control who has access to PGM Anywhere and to which groups of functions
- Improved and more attractive user interface; appearance responds to size of browser window
- Select all presentations simultaneously. No need to switch between programs 1-4.
- Designer Proposals brochure-style presentations (optional module)

Release 9 – Planned for November 2019

- Bug fixes
- Encrypt case data

Planned for Fall 2019

- Export PGM saved cases (.inp) to PGM Anywhere – enhancement to PGM

Release 10 – Planned for Q1 2020

- Terms for 3-10 lives, all combinations of term and lives
- “Other” IRS discount rate
- A few additional technical calculation enhancements
- Optimizer features (max CRUT and CRAT payout %, zero-out bargain sale taxes, CLT target deduction %) – may be in Release 11 instead
- Multiple property types – may be in Release 11 instead
- Enable single sign-on (optional module)

Release 11 and Beyond

- Specific features to be determined