Release Notes for *PGM Anywhere*
Release Date: 3/14/2025

Enhancements

Present value of projected amounts

We have added the ability to compute the present value of projected amounts. For example, you can compute the present value of the projected amount a charitable remainder unitrust will provide to your charity when it terminates. Similarly, you can compute the net present value of the income stream a charitable remainder unitrust is projected to distribute to the income beneficiaries during its term.

To compute the present value of projected amounts, choose "Yes" to "Show present values for projected amounts" in the Gift Date – Lives – Term window, then enter the present value rate you want to use. The default present value rate is the IRS discount rate you've selected, but you should enter whatever present value rate you feel is appropriate. By default, "Show present values for projected amounts" = No.

The presentations that can show present values are: Summary of Benefits Projection, Detailed Cash Flow Analysis, Taxation Schedule, and Unitrust Makeup Analysis projection charts, Summary of Benefits Projection – Numbers diagram, and Income Projection Line Graph graph.

Accessibility improvements

We have improved what a screen reader says when reading certain elements in the My Account, Edit User, and Gift Options screens to make them more accessible to the visually impaired. (The My Account screen opens when you click "Welcome" in the upper right corner of the *PGM Anywhere* screen.)

View password option

We've added a "Show password" check box to the login screen. When this box is checked, you can see your password and make corrections, as needed. When it is not checked, your password is masked. By default, the "Show password" box is not checked.

Clientname length limit increased to 30 characters

We have increased the maximum length of the Clientname you can enter when you log in to *PGM Anywhere* to 30 characters. The prior limit was 20 characters. If you would like us to revise your

Clientname to make it longer, or for any other reason, please contact Client Services at support@pgcalc.com or 888-474-2252.

Help system updated
We have updated the *PGM Anywhere* Help system to reflect all changes to the software.

Narrative Changes

Acknowledgement Letter
We added logic to exclude the paragraph on reporting capital gain when the gift is funded with life insurance. We also removed a warning relevant only to the Gift Summary that would appear when gifts funded with different amounts were selected.

Gift Annuity Agreement
Since this narrative no longer asks, "Create agreement for QCD from IRA?" (it knows from the funding asset selected for the gift annuity), we updated the QCD warning messages and error text to remove references to this question.

Gift Annuity Disclosure Statement
We removed the warning about complying with New York maximum annuity rates when the donor's state of legal residence is New York. For charities that follow the maximum rates suggested by the American Council on Gift Annuities (ACGA), this warning is no longer necessary because New York's maximum rates have been consistently higher than the ACGA rates since January 2024. That is when New York revised its methodology for setting maximum annuity rates.

Proposal Letter
Description and/or Example
Long Description and/or Example
Comparative Description
When multiple property types is selected, new text explains that if the donor sells these assets, all the donor's capital gain and ordinary income in them will be taxed.

Bug Fixes

Complete header visible on every page of presentations
When you produce a multi-page presentation, such as a Taxation Schedule for a flexible gift annuity or a Detailed Cash Flow Analysis for a projection that lasts 30 years, the complete header section now appears on every page. Previously, the presentation name, optional text, and bottom ruled line were missing from the header section on all pages except the first page.

Space no longer lost before certain characters in Designer Proposals
When a "(" or "-" is included in the Designer Proposal text, there is now a space between this character and the word preceding it. Previously, this space was missing under these circumstances.