Release Notes for *PGM Anywhere*
Release Date: 6/24/2025

Enhancements

Accessibility improvements
We have made further improvements to *PGM Anywhere* accessibility. These include:

1. Several clickable elements, such as the Close Tools button and "Sign Out" text, did not change color when hovered over with the cursor. Now they do, making it clearer to the user that clicking any of these elements with trigger an action.

2. We have improved the reading of error messages and notice messages by screen readers, such as NVDA and Chrome Vox. We plan to make further improvements here in the next release.

Management Fees line added to body of Summary of Benefits Projection chart
We have added a Management Fees line to the body of the Summary of Benefits Projection chart. This line displays the management fee percentage for each gift shown. Previously, only the total dollar amount of projected management fees was shown in the body of the chart.

Technology improvements
We have upgraded several third-party software tools *PGM Anywhere* relies on to do what it does. We plan to upgrade more of these tools in upcoming releases to stay current with the latest versions. Mostly, these upgrades don't affect your experience using *PGM Anywhere*. However, you may notice that text in all the *PGM Anywhere* windows is a little bigger than before. This is the result of our upgrade of software that helps us create *PGM Anywhere's* user interface.

Narrative Changes

Proposal Letter
Description and/or Example
Text is no longer produced for these two narratives for the No Gift to Charity option. Previously, the last paragraph of the Proposal Letter and the footer for the Description and/or Example were being produced.

Bug Fixes

Deferred gift annuity and flexible gift annuity rates didn't always match PGM desktop
There were edge cases where the annuity rate computed by PGM desktop for a deferred gift annuity or flexible gift annuity would be 0.1% lower than the annuity rate computed by *PGM Anywhere*. This discrepancy no longer occurs.

Fixes to Summary of Benefits Projection formatting
We made two fixes to the formatting of the Summary of Benefits Projection chart.

1. "Information on income and capital appreciation assumptions can be found on the Investment Assumptions chart" appeared in the Assumptions block, even when the investment assumptions

appeared in the body of the chart. Now, this sentence appears only when investment assumptions are too complex to show in the body of the chart.

2. The PRESENT VALUE line appeared above the "First Year Sales Cost" and "Annual Amount to Spend" lines when either or both of those lines appeared. Now, the PRESENT VALUE line appears where it should: below these two lines.

No Gift to Charity with a narrative selected could trigger an undetermined error
An undetermined error occurred when a No Gift to Charity option was funded with appreciated property, a narrative was selected, and you clicked Results. The presentations are now displayed properly in Results in this situation.

QCD-related note was missing from bottom of Comparison of Benefits chart
A note that should appear at the bottom of the Comparison of Benefits chart when a CRUT or CRAT is funded with a QCD was appearing only when a CGA was included on the chart. Now the note appears whenever any eligible gift option is funded with a QCD, whether alone or in combination with other gift options. The note says: "# All payments must be reported as ordinary income."

Better handling of special characters in narratives when retrieved from a file (.inpx)
We have improved the handling of special characters, such as apostrophe (') and ampersand (&), that are copied into a narrative follow-up question from Word. When this sort of case was saved in a file (.inpx) and the case was then opened, certain special characters were rendered as HTML code, such as "&" for ampersand, rather than as the special character itself. Now, all special characters are rendered as themselves in this situation.