Release Notes for *PGM Anywhere*
Release Date: 6/22/2022

Enhancements

New 2010CM mortality table added
We have added the new 2010CM mortality table for computing planned gift charitable deductions and valuing other split interests. Per proposed regulations published by the IRS, donors can choose between 2010CM and 2000CM (the table used for these calculations since 7/1/2009) when computing deductions for gifts made on or after 1/1/2021. Table 2010CM will become the required table for performing these calculations on the first day of the month after the IRS publishes final regulations.

In the Date-Lives-Term window, you will now see an "IRS mortality table" menu at the bottom of the window when you enter a gift date on or after 1/1/2021 and a gift term based on lives or lives and a fixed term. Calculations will be based on the mortality table you pick: 2010CM or 2000CM.

In most cases, you will maximize the donor's tax benefits by choosing Table 2000CM. There are situations, however, where picking Table 2010CM will maximize the donor's tax benefits. See the "Which Mortality Table Should Your Donor Choose" section of our blog post about Table 2010CM for guidance. You can also click "Help" in *PGM Anywhere* when answering "IRS mortality table (read Help for selection advice)" in the Date-Lives-Term window to read guidance on which table to choose in all the situations you are likely to encounter.

Presentation changes reflect selection of 2010CM mortality table
When the IRS mortality table question appears in the Gift Date-IRS Discount Rate window, the selected table appears in the footer of all charts and graphs. In addition, citations in the Actuarial Calculations and Non-charitable Interest Actuarials charts reflect the mortality table selected.

Accessibility
We have increased non-text color contrast, as needed, to comply with the WCAG 2.1 1.4.11 Non-text Contrast standard. This is a Level AA standard. We plan for *PGM Anywhere* to meet all Level AA standards in the next release.

We have also improved the tab sequence at the end of windows that can be opened from a left navigation bar: pressing tab at the end of these windows now moves the focus back to the left navigation item for opening the window. We have additional keyboard navigation improvements planned for the next release.

For more detail on the accessibility features in *PGM Anywhere*, go to *Help > Contents > Setup > Accessibility* in Help.

Annuity starting date for DGAs shown on SoB and TGAP charts
The annuity starting date is now shown in brackets along with the ages at annuity starting date on the Summary of Benefits and Taxation of Gift Annuity Payment charts.

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

Narrative Changes

None

Bug fixes

Retained life estate deduction could be slightly low in some cases
When you computed the charitable deduction for a retained life estate where the age of the beneficiary plus the estimated useful life was less than 110, the deduction amount could be slightly lower than the correct amount. *PGM Anywhere's* default estimated useful life is 45 years, so in most cases the deduction was correct unless one or more beneficiaries were younger than 65. We have fixed this bug. The deduction amount is now correct no matter the beneficiary ages and the estimated useful life value.

Immediate annuity of $1,000 or more could be converted incorrectly after opening a case
When you, (1) opened a gift annuity case where the annuity amount saved in the case was entered as a dollar amount of $1,000 or more, and then (2) opened the gift annuity follow-up window, the annuity amount was converted to a very small dollar amount. This no longer happens. Whatever dollar amount was saved with the case is now maintained after opening the case and then opening the gift annuity follow-up window.

Value of Remainder Interest was always $0 on NCIA chart for custom pooled income fund
The Value of Remainder Interest on the Non-Charitable Interest Actuarials chart was always $0 for a custom pooled income fund. The Value of Life Interest, which is the focus of the chart, was always correct, however. The Value of Remainder Interest is correct now, too.

Change in annuity rate table was not reflected on FGA presentations
When you changed the ACGA rate table selected under *Customize > Calculation Options* while a flexible gift annuity was selected, the rate table identified on presentations did not change and the "Annuity rates are from [table name] table" column note did not appear on columnar presentations or the Income Projections line graph. These issues are fixed.

ACGA2022 rate table saved in case was shown as ACGA2020A after opening case
When you saved a case using the new ACGA rates, then opened this case in a new session, the ACGA rate table identified in charts was ACGA2020A instead of ACGA2022. ACGA2020A is the ACGA rate table that went into effect 7/1/2020. This issue could occur when you had *ACGA rates effective on date of gift* selected under *Customize > Calculation Options > Gift annuity rate table* and entered a gift date of 7/1/2022 or later. The gift annuity charts now show "ACGA2022" whenever appropriate.

CLAT target deduction > 100% no longer allowed
It was possible to enter a target deduction percentage for a lead annuity trust or lead unitrust greater than 100. Now you can't.

Some user account fields did not allow certain special characters
Certain client and user account fields could not include special characters, which was problematic for organizations or people with these characters in their name. The special characters period (.), comma (,), apostrophe ('), and hyphen (-) are now allowed in these fields under Customize > Organizations and Users > User Management. If you have difficulties adding any of these special characters or wish to edit a field that only PG Calc can change, such as the clientname you enter when logging in, please contact Client Support.

Windows in left navigation could not be opened after clicking Cancel to a message
When you change the gift term in Date-Lives-Term to a fixed term while a gift annuity or pooled income fund is selected, a message appears that tells you a fixed term is not allowed for these gift types and they will be removed. If you clicked Cancel in this message, you could no longer open any of the windows accessible from the left navigation, such as Gift Options and Presentations. Now you can.

Picture pickers for Designer Proposals could show two selections
When viewing the follow-up window for a 2-page or 4-page Designer Proposal, sometimes the picker for one or more of the pictures appeared to have two images selected. The selected image on the left would appear in the Designer Proposal. Now, each picture picker shows only one selected image.

Focus was not visible after selecting Edit icon in Assumptions window
After selecting the Edit icon to the left of one of the section headings in the Assumptions window, such as Gift Options, the focus was not visible in the screen that then opened. You had to press Tab or click in the screen to make the focus visible. Now it is visible when the screen opens.

Known Issues

Age differences on *PGM Anywhere* Release presentations vs. *PGM 7.5G* presentations
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 7.5G* 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 7.5G* it is based on the date of first payment. We expect to resolve this discrepancy between the two products in a future release.

On iPads running iOS 13 or earlier, question doesn't appear after non-cash property selected
When entering information in the charitable gift annuity (CGA) follow-up window, "Is annuitant also the donor" (1-life) or "How to report gain" (2 lives) should appear after you change the property type from "cash" to any other choice and then enter a cost basis lower than the value of property transferred. This question determines how the gift annuity payments will be taxed. On iPads running iOS 13 or earlier, this question does not appear unless you close and then reopen the CGA follow-up window. On iPads running iOS 14 or higher, they appear immediately. To avoid overlooking this question, we recommend using *PGM Anywhere* on iPads running iOS 14 or higher.

"Font is not available. Select another font from the list"
In Firefox on a Samsung Galaxy, 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.