

Enhancements

Optional Social Security number blocking

We have added optional blocking of Social Security numbers. If you wish, we can configure your organization's *PGM Anywhere* account so that questions that ask for a Social Security number never appear. Social Security numbers saved in cases in the *PGM Anywhere* database prior to PG Calc configuring your organization's account to block Social Security numbers are deleted as part of the configuration process.

When Social Security numbers are not blocked, they can be entered and saved as part of a case when you select any of the following narratives: Gift Annuity Agreement, Gift Information Summary, and IRS Discount Rate Election Statement. Entering the Social Security number can be useful in these narratives and when saved in a case is stored online in an encrypted format designed to keep that data secure. The option to block entry of Social Security numbers is for organizations who, for security and/or compliance reasons, are willing to forgo this functionality to eliminate storage of Social Security numbers in *PGM Anywhere*.

Please contact PG Calc at support@pgcalc.com or 888-474-2252 to request blocking of Social Security numbers.

FGA annuity can be entered as \$ amount or a %

Flexible gift annuity rates can now be entered as a dollar amount or as a percentage rate, just like gift annuity rates and deferred gift annuity rates. When you enter a value of 100 or less without a "\$" or "%," it is interpreted as a percentage. Otherwise, it is interpreted as a dollar amount. When you include a "\$" or "%" in your entry, the value is interpreted according to the sign entered.

Help system updated

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

Bug fixes

Exported presentations no longer can be opened by another account

It was possible when two different clients exported presentations to PDF, Word, or Excel at almost exactly the same time for the other client's presentation to open in PDF, Word, or Excel. This no longer can happen. Each exported file can be opened only by the *PGM Anywhere* user who exported it.

Known Issues

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.

Termination of Gift Annuity values can be wrong for FGAs

There are situations where values in the Calculations section of the Termination of Gift Annuity chart can be wrong for a flexible gift annuity. One example is when only one of two annuitants is surviving on the date of termination. Because of these issues, a warning message appears on the chart whenever it is produced for an FGA. The warning message recommends performing the calculations in *PGM* desktop or contacting PG Calc for assistance.

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

“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.