

Enhancements

Accessibility

We have made changes to the user interface in every *PGM Anywhere* screen so that it now fulfills all accessibility criteria defined in WCAG 2.1 Level A. These changes make it possible for users to navigate *PGM Anywhere* using only keyboard commands and to rely on a screen reader to tell them where they are at every point in the software.

Users will notice a couple changes related to these accessibility improvements. First, a box now outlines the focus location. The box appearance depends on the browser being used. Second, you now press *Tab*, rather than *Enter*, to move from one field to the next using the keyboard.

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

New Template Group and New Templates

We have added a new template group, *Optimizer Functions*, under *Open > Templates*. The *Optimizer Functions* group includes a template for each of *PGM Anywhere's* optimizer functions. The new templates are:

CRU Maximum Qualified Payout Rate
CRAT Maximum Qualified Payout Rate
CLAT 100% Deduction Payout Rate
CLUT 90% Deduction Payout Rate
FGA Deduction Maximized for Target Start Year
Bargain Sale with \$0 Net Tax

In addition, we've added to the *Gift Annuities* template group two templates for performing calculations when a gift annuity terminates:

Termination of Gift Annuity - Death of Annuitant
Termination of Gift Annuity - Gift of Income

Import .inpx file containing multiple cases

We have added to *Open > Import from .inpx file* the ability to import multiple cases from a single .inpx file and save them in *PGM Anywhere's* case database. We've made this enhancement in anticipation of updating *PGM* desktop with a function that will enable users to convert a group of case files from *PGM* desktop's .inp format into one file in *PGM Anywhere's* .inpx format. This enhancement to *PGM* desktop will be made available in a future update to *PGM*. This enhancement also supports opening .inpx files created with the new Export All function described below.

New Open > Saved case features

We've added several features when you choose *Open > Saved case*.

- An *Export All* button allows you to save in a single .inpx file all the cases contained in your current search list. This feature can be a handy way to back-up your saved cases or share them with

another *PGM Anywhere* user. A *Delete All* button allows you to delete all cases in your current search list.

- You can now search on the *Case Notes* field when you choose *Open > Saved Case*.
- You can now edit the case name and donor name for a saved case directly from the search window. This feature is useful when you want to revise a case name or donor name without changing any other details of a case. Previously, the only way to revise a case name or donor name was to open the case and then re-save it with a revised case name and/or donor name.

Improved security when an account is locked

A *PGM Anywhere* user cannot log in to a locked account. We have tightened *PGM Anywhere* security by requiring a user whose account is locked to ask someone else to unlock it. This person can be anyone at the organization with access to *PGM Anywhere*'s Users menu, such as the primary administrator. An account may become locked because the user entered the wrong password too many times in a row or too much time has passed since the last login, for example. This change is consistent with a similar change we made in GiftWrap recently. Previously, a user could unlock their account themselves using Forget Password.

Help system updated

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

Narrative Changes

Default for "Include reference to 100% of AGI limit" is now "No"

In 2020 and 2021, donors could deduct cash gifts to public charities up to 100% of their adjusted gross income, rather than the usual 60%. This special rule was included in the CARES Act to encourage charitable donations during the COVID pandemic. To accommodate the rule, we added a question to four narratives that asked whether you wanted to include a sentence about the 100% of AGI rule in the narrative. The default answer was "yes." Now that the special rule has expired, we have changed the default answer to "no."

Bug fixes

Some narratives formatted badly after export to Word

When they were the first presentation selected, the narratives below displayed bad formatting after being exported to Word using the "Most accurate export for narratives" method:

Proposal Cover Page
Description and/or Example
Long Description and/or Example
Comparative Description
Gift Information Summary

Now, they are formatted properly after export to Word regardless of where they are in the list of selected presentations.

Deferred gift annuity payout rate saved as a dollar amount could be wrong after opening a case

When the annuity rate for a deferred gift annuity was entered as a dollar amount and the case then saved, the default annuity rate assigned when the case was opened was wrong. Rather than being the

same dollar amount that was saved, the annuity rate was converted to a percentage of the same number. For example, a \$600 annuity rate was converted to a 600% annuity rate when the case was opened. This no longer happens.

Results did not work after opening either flexible gift annuity template

When you clicked *Results* after opening either of the two flexible gift annuity templates, nothing would happen. Now, the *Results* window opens and the expected presentations appear.

Termination of Gift Annuity values could be wrong for FGAs

There were situations where values in the *Calculations* section of the *Termination of Gift Annuity* chart could be wrong for a flexible gift annuity (FGA). One example was when only one of two annuitants was surviving on the date of termination. We have resolved these bugs. The *Termination of Gift Annuity* chart now shows correct calculated values in all situations and the warning message that appeared on the chart for FGAs has been removed.

IRS discount rate menu for date of termination did not update properly

In the *Termination of Gift Annuity* chart follow-up screen, the IRS discount rate menu for the date of termination could list the wrong choices after changing the reason for termination from *Gift of annuity interest* or *Cash out of annuity interest* to *Death of last annuitant*. This IRS discount rate menu now always displays the correct choices in this situation.

Exporting to Excel in Firefox browser could cause wrong file extension to be appended

When running *PGM Anywhere* in Firefox, an extra file extension was being added when exporting presentations to Excel. For example, the file name would become "gift-plan-3-30-2023.xlsx.xls". This no longer happens.

RLE value of building(s) and salvage value of building(s) formatted incorrectly in Gift Options UI

When you opened a case from an .inpx file that included a retained life estate and then opened the retained life estate window, the amounts displayed for the value of buildings and the salvage value lacked a "\$". Now they don't.

Incorrect modification date was stored in .inpx files

When saving a new case in a file to share (.inpx), the modification date of the case was not being set to the current date. Now it is.

Known Issues

Immediate payment gift annuity payout rate can be wrong after opening a case

When the annuity rate for a gift annuity is entered as a dollar amount of \$1,000 or more and the case is then saved, the default annuity rate assigned when the case is opened is initially correct. However, if you open the follow-up window for the gift annuity, the annuity amount becomes very small. For example, a \$1,000 annuity amount for a \$100,000 gift is converted to a \$1.00 annuity amount.

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.