

**Planned Giving Manager Suite**  
**Planned Giving Manager/Mini Manager/Gift Annuity Manager**  
**Windows and Macintosh Version 6.1A Update**  
**January 2008**

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Dear PGM Client,

I am pleased to announce the release of **Planned Giving Manager version 6.1 A**.

PGM 6.1 A includes:

- A trust income tax table that reflects 2008 indexing
- IRS discount rates updated through February 2008
- Minor modifications to several Narratives
- Online Help updated with recent tax rulings important to planned giving (Windows version only)

These changes are detailed on the following page. Please review them so that you understand them before you use your updated software.

If you have any questions about the software, please do not hesitate to call Client Services toll free at 888-4PG-CALC (888-474-2252). We look forward to helping you get the most out of PGM 6.1A.

Sincerely,



Gary M. Pforzheimer

# Summary of Enhancements

## Enhancements

- **Indexed trust and estate income tax schedules applied in Lead Trust Projections**

Lead Trust Projections uses the federal income tax table for estates and trusts when it computes the income tax on a lead trust's or regular irrevocable trust's taxable income. PGM 6.1A incorporates for this purpose the federal income tax schedule for estates and trusts for 2008.

- **IRS discount rates updated through February 2008**

As we do with every update, we have included all monthly IRS discount rates up to the month of release in order to ensure their accuracy. PGM 6.1A incorporates discount rates through February 2008. We send a monthly e-mail message with the most current IRS discount rate. If you are not receiving the IRS discount rate this way, but would like to, please visit [www.pgcalc.com/drate/erate.htm](http://www.pgcalc.com/drate/erate.htm). You will continue to receive our monthly IRS discount rate postcard whether or not you sign up for the E-rate.

- **Online Help updated with recent tax rulings** (Windows version only)

We have updated PGM's Online Help with several important rulings made by the IRS in 2007. Revenue Procedures 2007-45 and 2007-46 contain sample trust instruments for charitable lead annuity trusts and Private Letter Ruling 200725044 includes an example of how to value an income interest in a net income unitrust.

- **Narrative changes**

We have made minor text changes to the Gift Annuity Disclosure Statement to assure that it reads properly when a donor establishes a gift annuity for someone else. We also made minor modifications to the Gift Annuity Agreement, Description and/or Example, and Long Description and/or Example to fix a handful of subtle issues.