



Planned Giving Manager Suite

Planned Giving Manager/Mini Manager/Gift Annuity Manager

Windows Version 7.5F Update

May 2021

Dear PGM Client,

I am pleased to announce the release of **Planned Giving Manager version 7.5F**.

This update adds a warning message about New York maximum annuity rates when you produce a Gift Annuity Agreement or Gift Annuity Disclosure Statement for a New York donor. We've added this warning because of the current conflict between New York maximum annuity rates and the suggested maximum annuity rates published by the American Council on Gift Annuities. See the next page for more details.

We recommend that you install this update if your organization issues gift annuities in New York. If your organization does not issue gift annuities in New York, you do not need to install this update.

If you have any questions about the software, please do not hesitate to call Client Services toll free at 888-474-2252. We look forward to helping you get the most out of PGM 7.5F.

Sincerely,

A handwritten signature in blue ink, appearing to read "G. Pforzheimer".

Gary M. Pforzheimer

Summary of Enhancements

Narrative Changes

- **New warning message on two narratives**

We have added a warning message about New York maximum annuity rates to the Gift Annuity Agreement and Gift Annuity Disclosure Statement narratives. These are the two places where our software asks for the donor's state of residence. We've added this warning because of the current conflict between New York maximum annuity rates and the suggested maximum annuity rates published by the American Council on Gift Annuities (ACGA). The message alerts you that you are producing the narrative for a New York donor and tells you where you can read PG Calc's [detailed discussion](#) on complying with New York maximum annuity rates. You may want to bookmark our discussion of the New York rates for easy reference.

The ACGA is working with New York regulators and legislators to resolve the current conflict. We are following this situation closely and will notify you if and when it is resolved.