



**Release Notes for *PGM Anywhere* patch of 10/25/2024 release  
Release Date: 11/8/2024**

This patch addresses issues found in the major update of *PGM Anywhere* released on 10/25/2024. The issues fixed by this patch are described below.

**IRS discount rate message could display when gift month was after last IRS discount rate month**

We added messages in our October 25 release that alert you when the selected IRS discount rate will not maximize the deduction for one or more of the gift options selected. Those messages could appear even when the month of gift was after the month of the last known IRS discount rate. Now, a new message appears in that situation that alerts you that the three IRS discount rates for the month of gift are not yet known.

**Capital gains tax savings now appears on the SoBP-N diagram when it should**

The amount of capital gains tax savings should appear in the “Immediate” section of the Summary of Benefits Projection – Numbers diagram for gifts funded with appreciated property. This text was not appearing for several gift options funded with appreciated property. Now it is.

In addition, this text was appearing for gifts funded with a qualified charitable distribution (QCD). This text should not appear for QCD-funded gifts. Now, it doesn’t.

**Ages at Start Date were incorrect for FGAs on multiple presentations**

The Ages at Start Date column shows the annuitant ages on all the elective start dates for a flexible gift annuity. This column appears on the Summary of Benefits, Actuarial Calculations, Non-charitable Interest Actuarials, and Termination of Gift Annuity charts. The ages on the first elective start date were also appearing for every other elective start date. These ages now increment properly. No other values on these charts were affected by this bug.

**New message notes likely QCD cases from past releases**

Prior to the October 25 release, the way to illustrate a gift annuity (or charitable remainder trust) funded with a qualified charitable distribution (QCD) was to select “ordinary income property” as the property type and enter \$0 as the cost basis. Now, you illustrate a QCD-funded gift by selecting “retirement asset” as the property type and a QCD option as the transfer type. We have added a message that describes how to select a QCD the new way whenever you open a saved case that was likely an old-style QCD illustration.

**Issues related to *PGM Anywhere* cookies**

A few clients found a variety of *PGM Anywhere* functions unresponsive when they logged in after the October 25 release. We determined that for these clients, cookies created during a prior *PGM Anywhere* session were not compatible with the new release. Once they used the “delete cookies” feature in their browser, the problems they were having running *PGM Anywhere* disappeared. We have made changes to the application that will prevent this issue going forward.

**Taxation Schedule breaks page after Assumptions when too long to fit on one page**

When a projection lasted for enough years that the Taxation Schedule chart did not fit on one page, the chart would break to a second page between the end of the Assumptions section and the first row of taxation information. Now, the first page fills with rows of taxation information to the bottom and then breaks to a second page for the remaining rows.

**Total cost basis can be wrong for multiple property types on two charts**

When you entered a cash gift, then switched to multiple property types and changed the cash amount, the total cost basis that appears on the Summary of Benefits and Taxation of Gift Annuity Payments charts reflected the original cash amount rather than the cash amount entered under multiple property types. This bug is fixed.