



California Wills & Trusts (v.17.03) **California Irrevocable Trusts (v.17.02)**

August 2017

Updated Product Features

New Level 3 Subsection Option for Wills and Trusts Custom Provisions

In response to customer requests, we have added the option to include a new level 3 subheading to the 'Add Custom Provision' question at the end of each major section in the Navigator for wills and trust documents in both the *CA Wills & Trusts* and the *CA Irrevocable Trusts* titles. This allows the user to add a subsection at level (a), (b), (c), and so on, under the level 2 headings which will provide greater flexibility when drafting documents and creating templates.

As before, you have the option of adding custom text either with or without a section heading. If you wish to create a template from your client answer file, the custom text will automatically become part of that template.

For more information on creating templates see **Creating Templates for Estate-Planning Products** in the **Using Templates** topic by selecting **HELP** from the Lawgic menu. In addition, you may attend one of our monthly template Webinars. [Click here](#) for more information and registration.

CA Wills & Trusts New Questions 119, 202, 219, 464, 485, 507, 594, 627, 652, 688, 720, 769, 781, 799, 811, 878, 885, 892, 926, 934, 971, 979, 1021, 1052

CA Irrevocable Trusts New Questions 280, 363, 414, 426, 442, 454, 521, 539

QTIP-able Bypass Option Now Available With Marital Trust

The new QTIP-able Bypass option that was added in version 17.01 in December is now available if a QTIP Marital Trust has also been selected at Questions 252 and 257.

New Limitations on Foreign Trustees Provision

A new limitations on foreign trustees option was added to the Appointment of Trustees article to allow users to avoid tax problems arising when trusts are administered by foreign trustees.
Question 693

New 180 Day Limit Option Added under 'Waive Reports and Accounts'

If the Trustees' duty to render reports and accounts to the beneficiaries is not waived, a new question was added asking if you want to limit the beneficiaries' right to object to 180 days. This appears in the Protection Provided the Trustees article. *New Question 760*

New No Contest Option Added to Amendment and Codicil

The option to add the No Contest provision to the trust amendment or codicil has been added. *New Questions 1083 and 1084*

New Trust Protector Option Added to CA Irrevocable Trusts

This new option adds trust protector provisions to the *CA Irrevocable Trusts* title. These provisions assist the trustee in making certain decisions. Trust protector powers may include the power to advise Trustees in general, to amend or revoke the Trust, to direct or restrict certain investments, to direct distributions of principal or income, to direct the exercise of fiduciary powers and to direct a change of trust situs. *New Questions 363-377*

Other

- The "Amount of Gift" Question 207 is now asked for a Pet Trust and the related provision has been added to the Distributions After Death for Specific Gift for Pet Trust section
- The default for all "Date of Signing" questions was removed
- The default for all "County of Execution" questions have been revised
- Minor revisions to the DISCLAIMER article
- Qualified Plan Proceeds article removed for Standalone Wills

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To view those questions that are new in this update, or where **Law & Strategy**, choices, or default answers have changed, use the "**Up_Aug17**" flag file. From inside Lawgic, open any existing answer file; on the **Flags** menu, click **Open Flags**, select the appropriate Title (click **OK**), and next select the "**Up_Aug17**" flag file (and click **OK**). To view all flagged questions, click **Expand All** on the **Answers** menu and scroll the Navigator. Flagged questions will be indicated with **blue bold** text.

Please continue to send us your suggestions on existing or new products. Contact our Technical Support Department at 1-877-2-LAWGIC (252-9442) or e-mail us at support@lawgic.com.