



## **Florida Wills & Trusts** **January 2017** (v.17.01)

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### **Legal Developments**

#### **Increased Federal Tax Exemptions (effective January 1, 2017)**

Applicable Exclusion Amount: \$5,490,000 (up from \$5,450,000)  
GST Exemption Amount: \$5,490,000 (up from \$5,450,000)  
Gift Tax Annual Exclusion Amount: \$14,000 (no change from 2016)

The adjusted amounts for 2017 will be reflected in the program when it is used in 2017.

### **Updated Product Features**

#### **New Assisted Reproduction Option**

A new "Exclude all post-mortem" option has been added to the assisted reproduction options.  
*Question 1108*

#### **Revised "Short Form" Durable Power of Attorney**

The "Use of Copies" provision has been added to the short form DPA as well as the option to indicate how you want attorneys-in-fact to act – by majority, unanimous or individually.  
*Questions 1255 and 1276*

#### **New "Trustee Signing Certification of Trust" Question**

A new question has been added as well as other minor question and text revisions to further clarify the creation of a Certification of Trust. *New Question 1429*

### **SOFTWARE UPGRADES**

**Note:** The Lawgic software now works with 4K monitors.

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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\_1701**" 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\_1701**" 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.

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