



## Lawgic 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)

### Updated Product Features

#### New Digital Assets and Accounts Options

Many states have adopted the Uniform Fiduciary Access to Digital Assets Act ("UFADAA") to provide for access to the digital accounts of decedents. [Click here](#) for more detail. The provision in the Fiduciary Powers article has been revised to include new, broader language and there is a new option to add even more detailed terms for fiduciaries, including the ability to name a separate "Digital Fiduciary" to deal with those assets. *New Questions 1031-1034*

#### New Assisted Reproduction Option

A new "Exclude all post-mortem" option has been added to the assisted reproduction options. *Question 1116*

### 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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