



California Wills & Trusts

January 2021

(v.21.01)

Legal Developments

Increased Federal Tax Exemptions

Applicable Exclusion Amount: \$11,700,000 (up from \$11,580,000)

GST Exemption Amount: \$11,700,000 (up from \$11,580,000)

Gift Tax Annual Exclusion Amount remains at \$15,000

Updated Product Features

New Custom Provision Option for CA Irrevocable Trusts

In response to customer requests, we have added the option to include new custom articles, sections, or subsections at the end of an irrevocable trust. This provides greater flexibility when drafting documents and creating templates. You also 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. *New Questions 533-538 CA Irrevocable Trusts*

For more information on creating templates see [Creating Templates for Estate-Planning Products](#) in the Using Templates topic from the Lawgic HELP menu or select "Create Your Own Templates" from the HOW TO menu at Question 13 in the *California Wills & Trusts* title. In addition, you may attend one of our monthly template Webinars. [Click here](#) for more information.

OTHER – New text added to Power of Appointment provisions in the Bypass and Marital Trusts and Trust for Designated Beneficiaries. *Questions 474, 493 and 544*

Software Upgrades

Improved Navigator Printing For Output To Excel

New "Send Navigator Outline" function allows export into a CSV file that can be saved as an Excel file. You may now use the "File>Send>Navigator Outline to Excel" menu item to send data from a file, including answers from all questions, flagged questions only, or unflagged questions only. As before, you can also send long or short answers and notes. Sending this data to Excel is not especially helpful in preparing a full document, but such a file with specific client data extracted from a Lawgic answer file will enable you to merge

that data into a custom document you have created. You must have Excel to use this function.

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To view the questions that have revised **Law & Strategy** use the "**Up_2101**" 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_2101**" 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.

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