Georgia Wills & Trusts
January 2021
(v.21.01)

Legal Developments

Increased Federal Tax Exemptions

Updated Synopsis to show correct Applicable Exclusion Amount
The just released inflation adjusted AEA for 2021 will be $11,700,000
GST Exemption Amount for 2021 is likewise $11,700,000
Gift Tax Annual Exclusion Amount remains at $15,000
Inflation adjustments for income tax figures in the Law & Strategy are also built in for use in 2021

Marital Funding and Qualification Article Now More Functional Than Before

The Funding and Qualification of Marital Trust has been adjusted to display provisions for QTIP Trusts without regard to secondary choices made. If a QTIP is chosen, whether with or without a Family Trust or a Disclaimer Trust, the appropriate QTIP options will be shown.

Updated Product Features

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.