



South Carolina Wills & Trusts

March 2019

(v.19.01)

Legal Developments

Increased Federal Tax Exemptions (effective January 1, 2019)

Applicable Exclusion Amount: \$11,400,000 (up from \$11,180,000)
GST Exemption Amount: \$11,400,000 (up from \$11,180,000)
Gift Tax Annual Exclusion Amount: \$15,000 (no change from 2018)

The former references to these amounts in the Law & Strategy and Synopsis (they do not appear in the documents) were necessarily generic, having been programmed before the exact IRS numbers were released. We have made them more precise for this year.

Updated Product Features

Certificate of Trust Existence and Authority Revised

The Certificate of Trust has been simplified and streamlined for greater accuracy, including new questions relating to trust name, grantor names, current trustee information and an optional question to include a Schedule A for successor trustees, among others. The method of using macros to import provisions from the trust agreement is no longer used. *New Questions 1389-1402, Deleted Old Questions 1390, 1393 and 1394*

New Springing Durable Power of Attorney Added

Based on customer requests, the program now includes a new springing version of the Durable Power of Attorney. *Question 1314*

Software Upgrades

New Formatting Feature – Microsoft Word Users

For Microsoft Word users, we have enhanced our formatting to automatically insert style separators in place of hidden paragraphs. The latter were necessary for earlier versions of Word to allow the use of two different styles on the same line; this made cross referencing possible, but sometimes created the potential for confusion when editing with Show/Hide active. Style separators do not cause such line breaks and, more importantly allow the Word Navigator to display the various headings in the document, which makes movement within the document and editing much simpler. For more about how to use the Word Navigator, check the Help section in Word.

In addition for Word users, we added a function to immediately convert the exported document to native Word format based on Word 2007 or later (versions earlier than Word 2007 are not supported), so your document will be in the .docx format when it opens.

Explanation: To be as flexible as possible for various word processors, Lawgic exports documents in Rich Text Format (RTF) that both Microsoft Word and Corel WordPerfect can easily read. RTF in its native form is not as robust or sophisticated as either of those word processing programs and, if the edited document is saved with an RTF extension, some glitches can occur. Some document management systems have trouble handling the conflict between formats. This new procedure should solve those issues.

WordPerfect users don't seem to have these problems, but we will keep an eye out for inconsistencies going forward.

New Functionality for 4K monitors

The Lawgic software can now save a font size up to 50 points (the maximum before was 24). You can now change the font size not only from the font size dialog, but also by selecting 'alt - up arrow' key to raise the font size and 'alt -down arrow' key to decrease the font size.

Revised User Interface

The user interface has been revised to include new sizing and coloring for buttons and icons in the question pane.

Other – The 'Law_Surf' file has been replaced with a new 'Sample' file. You may delete the 'Law_Surf' file if you wish.

* * * * *

To view those questions that are new in this update, or where **Law & Strategy**, choices, or default answers have changed, use the "**Up_1901**" 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_ 1901**" 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.