



## **Lawgic Wills & Trusts** **January 2019** **(v.19.01)**

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### **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)

### **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*

### **Other**

Product files - We are replacing the 'Law\_Surf' file with a new 'Sample' file. You may delete the 'Law\_Surf' file if you wish.

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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\_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.***