



## California Wills & Trusts August 2011 Update

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### Updated Product Features

#### New "Simple Will" Option

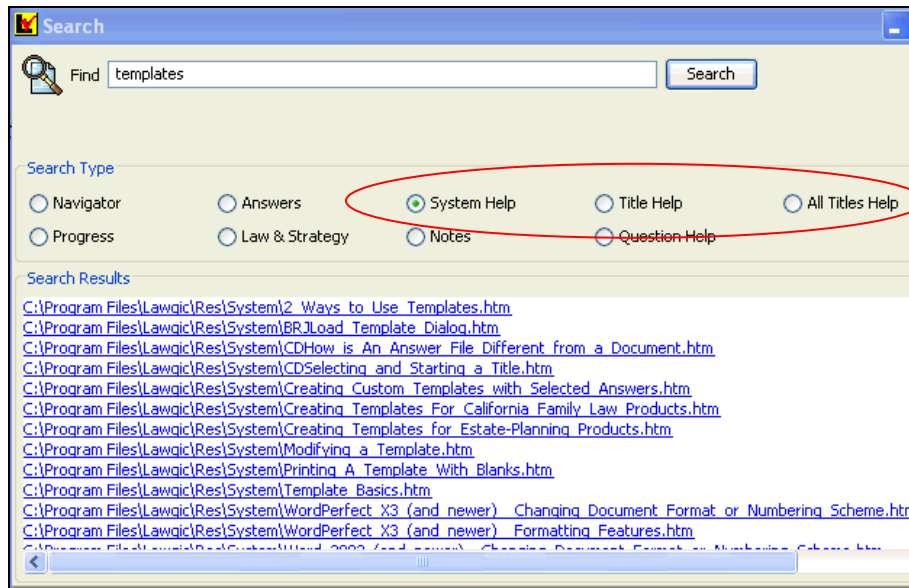
A new 'Simple Will' option at Question 3 (Will/Trust Document Version) has been added. The Simple Will pre-answers questions so that all distributions are outright. While it was added based on customer feedback, the editors still believe that the best planning structure for most clients is revocable trusts with pour-over wills for several reasons, including probate avoidance and privacy.

The Simple Will is even shorter and simpler than the "Shorter version" option. In a new answer file, the program automatically omits certain provisions and pre-answers additional questions that were not pre-answered in the "Shorter version." In addition, some questions, such as those that create trusts will have their answers *overwritten* if you try to change them. This ensures that all distributions are outright.

**Important:** if you use an *existing* client file (as opposed to a new one) where you started drafting a trust or "Shorter version" Will and then switched to the "Simple Will," certain answers from your existing file will *not* be overwritten because some questions are only pre-answered if they are empty. As a result, your Simple Will may contain more provisions than if you had started in a new file. See Question Help for a list of both pre-answered and overwritten questions. *Question 3.*

#### New Expanded Search Feature

The search feature has been expanded. In addition to searching the Navigator, Answers, Law & Strategy, Notes, Question Help, and Progress for a specific Title, it now allows you to search System Help, Title Help (Resources) and All Titles Help (Resources) by selecting **Search** on the Lawgic menu. This new function will help to facilitate and expedite your searches.



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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\_Aug11**" 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\_Aug11**" 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 **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.***