



*Intelligent Legal Technology®*

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***Welcome to Lawgic's  
Product  
Demonstration!***



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## *Ask Yourself...*

- ✓ *How do you stay current with constantly **changing laws**?*
- ✓ *Are you confident your documents cover the **relevant issues**?*
- ✓ *Are your documents **internally consistent**?*
- ✓ *Would you like more time to **serve your clients better**?*
- ✓ *Are you looking for ways to **expand your practice**?*

**.....Lawgic can help!**



## *What is Lawgic?*

Lawgic is a powerful yet easy-to-use software program that combines....

1.

*an intuitive  
Question-and-  
Answer process that  
easily identifies  
client issues....*

2.

*with state-specific  
legal research, analysis  
and related language  
relevant to each  
issue....*

3.

*to guide you through  
the creation of  
customized, complex  
legal documents.*

The software is **regularly updated** by expert authors, ensuring your documents reflect the latest legal developments.



## ***Lawgic's State-Specific Products Include...***

### **ESTATE PLANNING...**

- ✓ ***New York Wills & Trusts***
- ✓ ***Maryland Wills & Trusts***
- ✓ ***Florida Wills & Trusts***
- ✓ ***Georgia Wills & Trust***
- ✓ ***California Wills & Trusts***

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### **FAMILY LAW...**

- ✓ ***California Marital Settlements***
- ✓ ***California Pre/Post Marital  
Agreements***

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### **SOON TO BE RELEASED....**

- ✓ ***Massachusetts Wills & Trust***
- ✓ ***Virginia Wills & Trusts***
- ✓ ***District of Columbia Wills & Trusts***

**To be authored by  
recognized state authors  
in conjunction with  
Holland & Knight LLP**

*.....more states coming soon....*



## Florida Wills & Trusts - Title Page

✓ When you open a Lawgic product you begin at the *Title Page*.

✓ Lawgic uses an *'intelligent' Q&A approach* to creating documents. This ensures that all relevant issues are covered.

Lawgic - Florida Wills & Trusts - Smith

File Edit Questions Answers Client Flags Help

Navigator

Florida Wills & Trusts

- Title Page
- Client Information
- Children
- Single Beneficiary Trust
- References
- Family
- Wills
- Trusts
- Special Trusts
- Expenses and Taxes
- Dispositions
- Family
- Marital
- GST
- Treat Children Differently
- Trusts for Children
- Trusts for Descendants
- Special Trusts
- Grantor Trust Powers
- Optional Provisions
- Post-Death Trustees
- Provisions Governing Trustees
- Personal Representatives
- Will: Appointment of Guardians
- Will: Joint Accounts
- Withdrawal Powers
- Survival Provisions
- GST Provisions
- Expenses and Taxes
- Fiduciary Powers
- Administration and Construction

#0 Title Page

FLORIDA WILLS & TRUSTS

JOHN ARTHUR JONES, EDWARD F. KOREN, RICHARD L. STOCKTON, AND BRUCE STONE

HOLLAND & KNIGHT LLP

October 2001

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Previous Start

Progress Law & Strategy Notes Question Help

Quick Start for Wills & Trusts" in Resources (on the left) links to the Florida Probate Code; selected Florida Statutes; Florida Revenue Code; cited Code sections, regulations, and other legal authorities. Select "How To" at Question 1 ("Select an option for this product).

✓ All products are authored and updated by recognized legal experts.

✓ Clicking the START button begins the client interview...



## Select An Activity or Document

**3. Navigator** in left window expands and **displays an Outline of the product sections** showing which questions have been answered.

Each product has an **opening menu** where you select an activity or document.

**1. Question and answer choices** appear in the upper window....

**2. Progress, Law & Strategy, Notes, and Question Help tools provide assistance and legal guidance** in lower window....



# Answering Questions to Create A Document

Lawgic is easy to use...

✓ Once all questions are answered, *Lawgic creates a document and opens your word processor* where you can edit, name and save the document.

The screenshot shows the Lawgic software interface. The title bar reads "Lawgic - Florida Wills & Trusts - Smith". The menu bar includes "File", "Edit", "Questions", "Answers", "Client", "Flags", and "Help". On the left is a "Navigator" pane with a tree view of document sections. The main window is titled "#1 Select an Activity" and contains a list of activity options with radio buttons. The "Trusts" option is selected and circled in red. Below the list are "Previous" and "Continue" buttons, with the "Continue" button also circled in red. A yellow callout box with the number "1" contains the text: "1. Simply answer the question -- 'Trusts' is the selection here....". At the bottom of the window is a navigation bar with tabs for "Progress", "Law & Strategy", "Notes", and "Question Help". Below the navigation bar is a "HOW TO" section with text: "Provides a menu of topics you can select to view on screen or print for guidance on how to use this product." A second yellow callout box with the number "2" contains the text: "2. ...and click the **CONTINUE** button which takes you to the next *unanswered, relevant question* based on your prior answers."



# Using Progress, Law & Strategy, Notes and Question Help

✓ You can *click on the tabs* in the Folder window at each question to get....

✓ Let's briefly look at how each of these tools can *assist you in creating your document.*

The screenshot shows the Lawgic software interface for 'Florida Wills & Trusts - Smith'. The main window displays a question: 'What type of trust would you like to draft?' with several radio button options: 'Revocable Inter Vivos Trust' (selected), 'Amended and Restated Revocable Inter Vivos Trust', 'Amendment to Revocable Inter Vivos Trust', 'Irrevocable Life Insurance Trust', and 'Grandchild's Trust'. Below the question are 'Previous' and 'Continue' buttons. At the bottom, there are four tabs: 'Progress', 'Law & Strategy', 'Notes', and 'Question Help', each circled in red. A 'Navigator' pane on the left shows a tree view with 'Trusts' selected. Four yellow callout boxes provide descriptions for the tabs: 'Progress...' (displays text based on your answer choice), 'Notes...' (provides a place to leave notes and reminders), 'Law & Strategy...' (provides legal guidance by the expert authors), and 'Question Help...' (displays assistance on how to answer the question).



✓ Clicking the **Progress** tab displays suggested language from the expert authors **relevant** to each answer choice.

✓ When you change your answer, **Progress** displays the **changed text**.

The screenshot shows the Lawgic software interface. The title bar reads "Lawgic - Florida Wills & Trusts - Smith". The menu bar includes "File", "Edit", "Questions", "Answers", "Client", "Flags", and "Help". The "Navigator" pane on the left shows a tree view with "Tax Formula for Marital Gift" selected. The main window displays question #268: "What tax formula do you want to use for the marital gift?". Three radio button options are listed: "Preresiduary gift" (selected), "Residuary gift", and "Fractional share". Below the question are "Previous" and "Review" buttons. At the bottom, a tabbed interface shows "Progress" selected, displaying the following text: "If Wife Survives. If my wife survives me, the Trustees shall make the following distributions: Marital Gift. The Trustees shall set aside, as a separate trust (the 'Marital Trust'), the smallest pecuniary amount necessary to eliminate or reduce to the lowest possible sum the state and federal estate tax liability of my estate. This amount will be calculated by taking into account my applicable exclusion amount and all other tax credits, deductions, and other preferences allowed to my estate, based on the assumption that an election is made to qualify all of the property in the Marital Trust for the marital deduction. The amount of this gift, however, is not conditioned upon such an election being made, and will not be readjusted because of a disclaimer by my wife. Values finally determined for federal estate tax purposes are to be used in determining the amount of the Marital Trust. The Trustees shall administer the Marital Trust". A yellow callout box with a black border contains the text: "For instance, choosing the 'Preresiduary Gift' answer at this question, displays the related text below." Two black arrows point from this box to the selected radio button and the "Progress" tab. A red circle highlights the "Progress" tab and its content.

✓ *Progress* allows you to review the document language as you move through the Q&A...

✓ ...and provides a *preview* of the language that will be in your document.

The screenshot shows the Lawgic software interface for a document titled "Florida Wills & Trusts - Smith". The main window displays a question titled "Tax Formula for Marital Gift" with the text: "What tax formula do you want to use for the". Three radio button options are listed: "Residuary gift" (which is selected and circled in red), "Fractional share", and "Fractional share". Below the question are "Previous" and "Continue" buttons. A red oval highlights the "Progress" tab in the bottom navigation bar, which is currently active. To the left of the main window is a tree view of the document structure, with "Tax Formula for Marital Gift" selected. Two yellow callout boxes provide additional context: one on the left says "...note that *Progress* has changed to reflect the new answer choice of '*Residuary Gift.*'" and one on the right says "Now, if we change the answer to '*Residuary Gift.*'....". Below the question, a preview of the document language is shown, starting with "If Wife Survives. If my wife survives me, the Trustees shall make the following distributions:" followed by a detailed paragraph about a "Family Trust".

✓ **Law & Strategy** is a powerful research tool that provides a **summary of both federal and state law** relating to the question written by the expert authors.

**Law & Strategy** includes....

- ✓ Statutes, regulations, and court decisions....
- ✓ Legal ramifications of alternative approaches....
- ✓ Relevant practice considerations...

**Law & Strategy** is **regularly updated** when the law changes keeping you current.

The screenshot shows the Lawgic software interface. The title bar reads "Lawgic - Florida Wills & Trusts - Smith". The menu bar includes "File", "Edit", "Questions", "Answers", "Client", "Flags", and "Help". The "Navigator" pane on the left shows a tree structure with "Marital Gift" selected. The main content area displays the question "#266 Marital Gift" and the "Law & Strategy" answer. The answer text is circled in red and reads: "NO PROVISION FOR SPOUSE Under Florida law, the elective share statute serves as a roadblock to disinheriting a surviving spouse; Fla Stat §732.201 grants a surviving spouse a share of the estate of his or her spouse. Currently, the elective share consists of an amount equal to 30 percent of the fair market value (on the date of death) of all probate assets, computed after deducting from the total value of those assets: (1) all valid claims against the estate paid or payable from the estate; and (2) all mortgages, liens, or security interests on the assets. See Fla Stat §732.207. The key to the application of elective share is that it applies only to probate assets. Consequently, it often is circumvented by placing assets in a revocable trust or by using other "nonprobate" transfers (e.g., life insurance, IRAs, etc.) In an effort to curb attempts to circumvent Florida's elective share, the legislature has overhauled the current elective share law. Effective October 1, 1999, the new law applies to all decedents dying on or after October 1, 2001. For decedents dying before that date, the

**Notes** are helpful when you are....

✓ **...uncertain about a particular question and need to record your concerns.**

✓ **...handing off your work to a colleague and want to bring particular issues to his/her attention.**

✓ **...creating a template and want to record your insights.**

The screenshot shows the Lawgic software interface for a client named Smith. The main window displays question #273: "Marital Gift Outright or Trust". The question asks, "Shall the marital gift be made outright or in trust?" with three radio button options: "QTIP trust", "Power of appointment trust", and "Outright". The "Notes" tab is highlighted in yellow, and a red oval encircles the note text: "John: Please take a look at my answer to this question. Call if there are any issues." A yellow callout box points to the "Notes" tab with the text: "Click the **Notes** tab to record any observations you think relevant to a particular question." The left sidebar shows a tree view of the document structure, with "Marital Gift Outright or Trust" selected. The bottom navigation bar includes "Progress", "Law & Strategy", "Notes", and "Question Help".

## Using 'Question Help'

- ✓ **Question Help** displays context-sensitive Help relating to the question.
- ✓ It describes each answer choice and **provides assistance** on how to answer the question.

The screenshot shows the Lawgic software interface for 'Florida Wills & Trusts - Smith'. The main window displays question #17, 'Client Identity/Gender', with the prompt 'For which spouse do you want to now draft documents?'. There are two radio button options: 'Husband' (selected) and 'Wife'. Below the question are 'Previous' and 'Continue' buttons. A yellow callout box with a red checkmark contains the text: '✓ Question Help for this 'Client Identity' question describes how to create *mirror documents* by simply changing the answer choice at this question.' An arrow points from this box to the 'Wife' radio button. At the bottom of the interface, there are four tabs: 'Progress', 'Law & Strategy', 'Notes', and 'Question Help'. The 'Question Help' tab is selected and circled in red. The help text under this tab reads: 'DRAFTING DOCUMENTS FOR BOTH SPOUSES  
With the exception of letters, documents can only be drafted for one spouse at a time. The spouse you select in Question 17 ("Client Identity/Gender") will be considered the "client" as you answer questions to prepare his or her documents. To print mirror documents for the spouse, simply change the client identity to the spouse and then click the Continue/Review button in Continue mode until the "All Questions Answered" dialog box appears. If you want to create similar (but not identical) documents for the spouse, you can save this answer file under a new name (select "Save As" on the File menu) and use the newly named answer file for the spouse (remember to change the client identity to the spouse).'



## Using 'Tentative' When You are Unsure How To Answer

✓ The 'Tentative' feature is a powerful 'system alert' tool.

✓ As you will see in the next screen, Lawgic reminds you at the end of the Q&A session that you have marked questions 'tentative.'

The screenshot shows the Lawgic software interface for 'Florida Wills & Trusts - Smith'. A yellow callout box with a red checkmark contains the text: 'You can click the 'Tentative' icon when you are unsure how you want to answer a question and want to review it later.' An arrow points from this box to a red circle around a 'Tentative' icon (a small red flag) in the software's question list. The question list includes items like 'Remaining TPP to Spouse', 'Marital Gift', and 'Balance of Estate'. The 'Balance of Estate' question is selected. Below the question list, there are buttons for 'Previous' and 'Review'. At the bottom of the interface, there are tabs for 'Progress', 'Law & Strategy', 'Notes', and 'Question Help'. The 'Question Help' tab is active, displaying text about 'GST GIFT'.

✓ You can click the 'Tentative' icon when you are unsure how you want to answer a question and want to review it later.

Progress Law & Strategy Notes Question Help

GST GIFT  
A generation-skipping transfer (GST) tax is imposed by Chapter 13 of the Internal Revenue Code. The term "GST exemption" refers to the exemption provided in IRC §2631(a), which was set at \$1,000,000, but is indexed for inflation (currently, \$1,060,000). The GST tax is designed so that a transfer tax is assessed on each transfer of wealth from one generation to the next generation. The transfer of wealth to the next generation is covered by the estate tax and the gift tax; however, without the GST tax, if a transfer is made to a person who is two or more generations younger than the transferor, there is an avoidance of transfer tax at one or more generations. Thus, the GST tax is imposed as a backstop to the estate and gift taxes. One way to avoid the imposition of the GST tax is through the use of the GST exemption amount that is available to each transferor (currently, \$1,060,000). If this GST



## Reviewing 'Tentative' Answers

Before sending the document to the word processor, the program presents a 'Tentative Answers' dialog where you can choose to.....

The screenshot shows the 'Tentative Answers' dialog box with three options: 'Review Tentative Answers Individually', 'Remove Tentative Status from All Answers', and 'Ignore Tentative Status and Continue'. A red circle highlights these three options. Three yellow callout boxes provide instructions: 'Go back and Review each answer individually...', 'Remove the 'tentative' status from all answers, or...', and 'Ignore the 'tentative' status and continue....'. The background shows a document titled 'FLORIDA WILLS & TRUSTS' with a 'Navigator' pane on the left.

✓ Go back and **Review** each answer individually...

✓ **Remove** the 'tentative' status from all answers, or...

Review Tentative Answers Individually

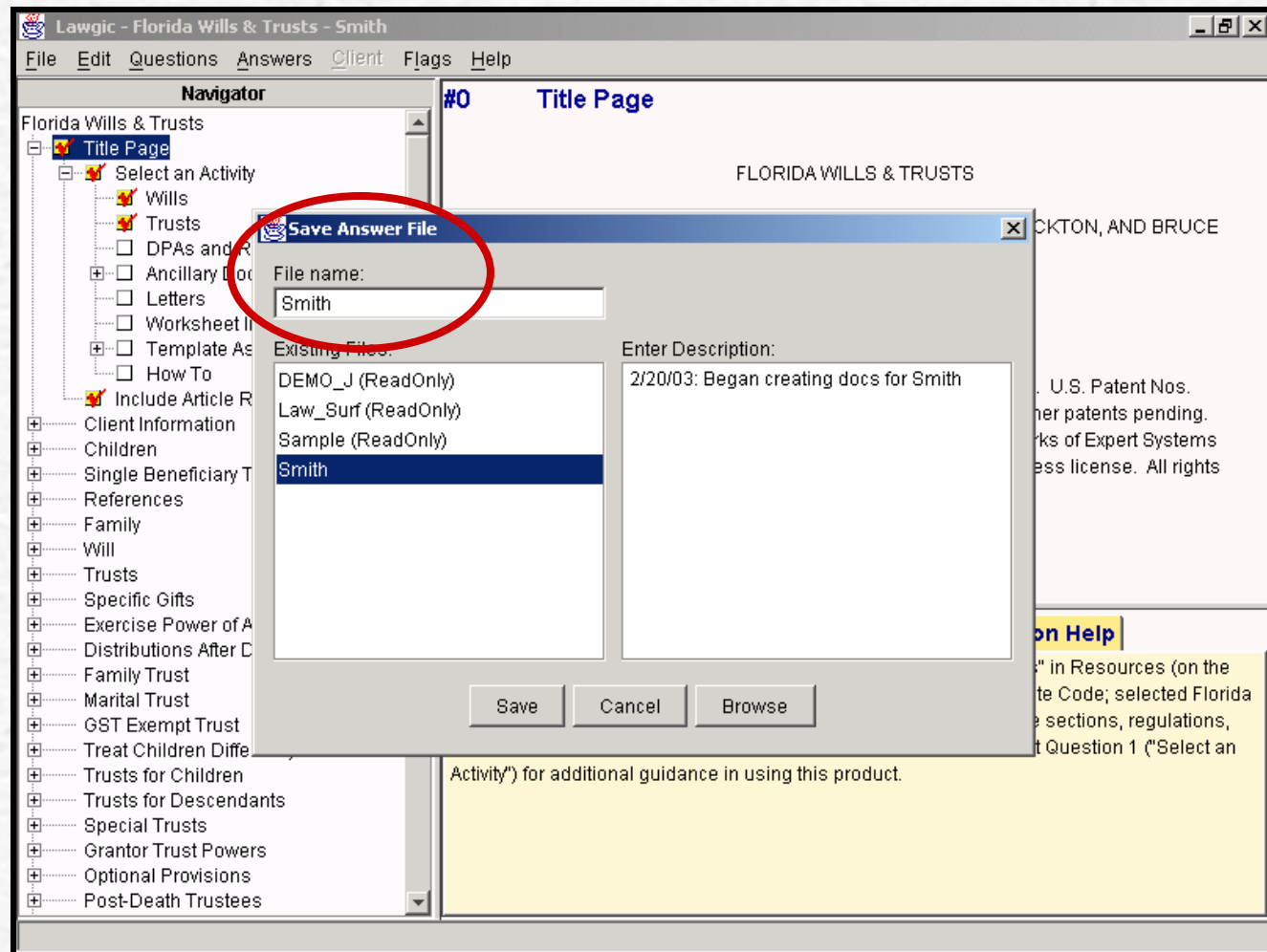
Remove Tentative Status from All Answers

Ignore Tentative Status and Continue

✓ **Ignore** the 'tentative' status and continue....

## Saving Answers

- ✓ Answers are saved in an *answer file*.
- ✓ Answers are shared to create multiple documents from one answer file, so *you only need to enter information once!*
- ✓ This reduces errors and *ensures consistency*.



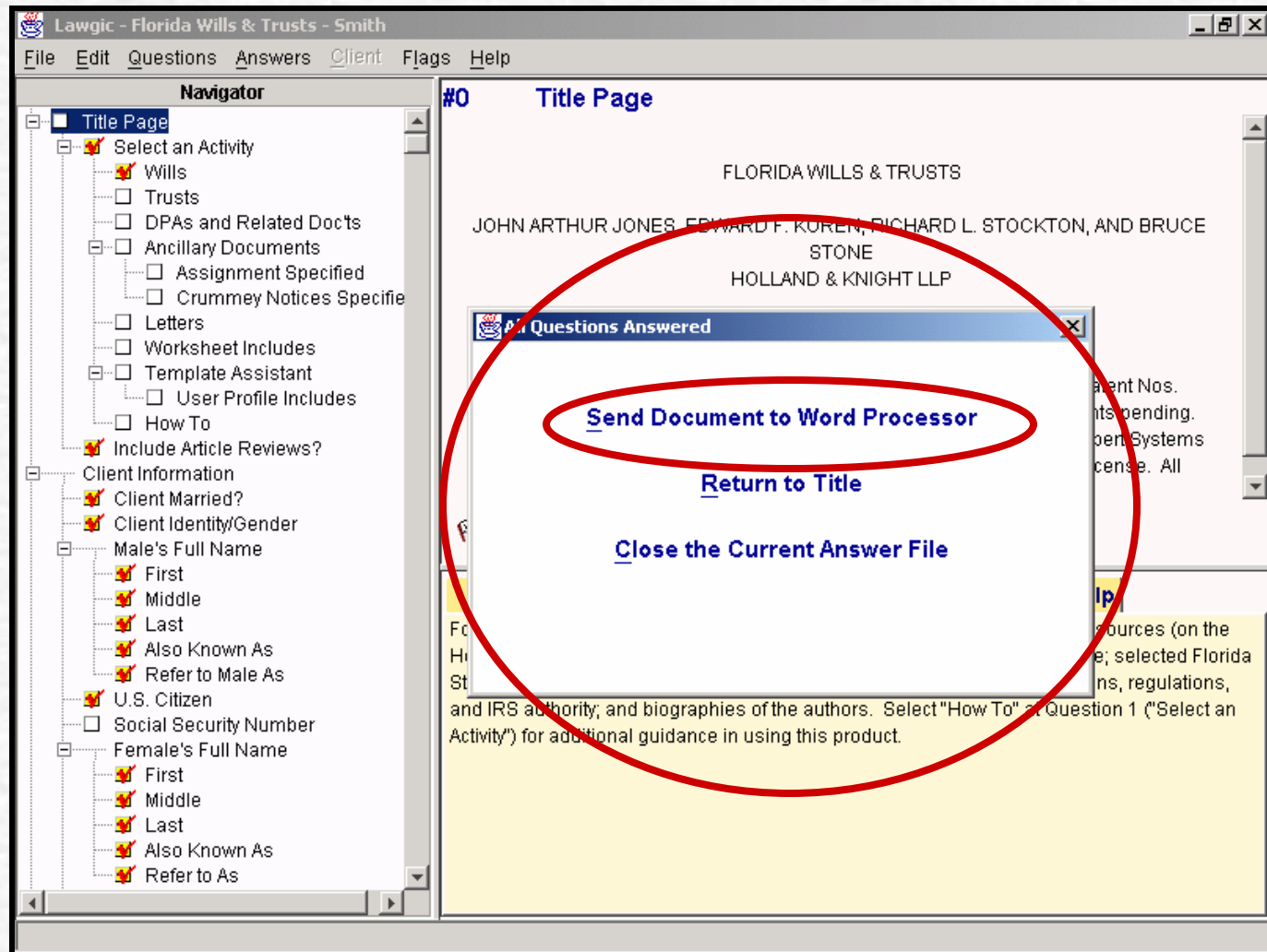




## ***Sending Document to Word Processor***

✓ The '*All Questions Answered*' dialog is presented at the end of the Q&A session.

✓ When you select '*Send Document to Word Processor*' Lawgic prepares a document based on your answers and opens your word processor.

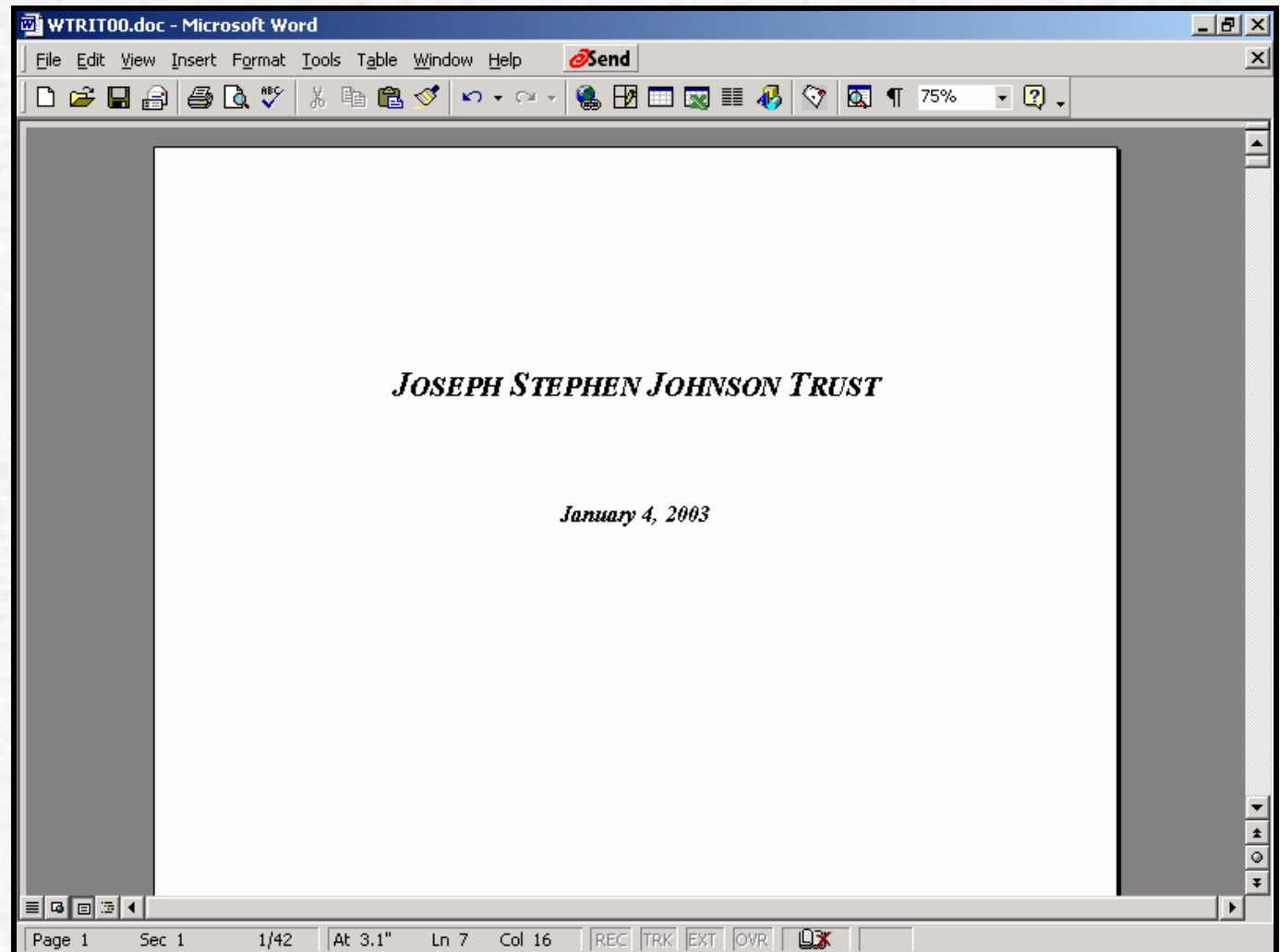




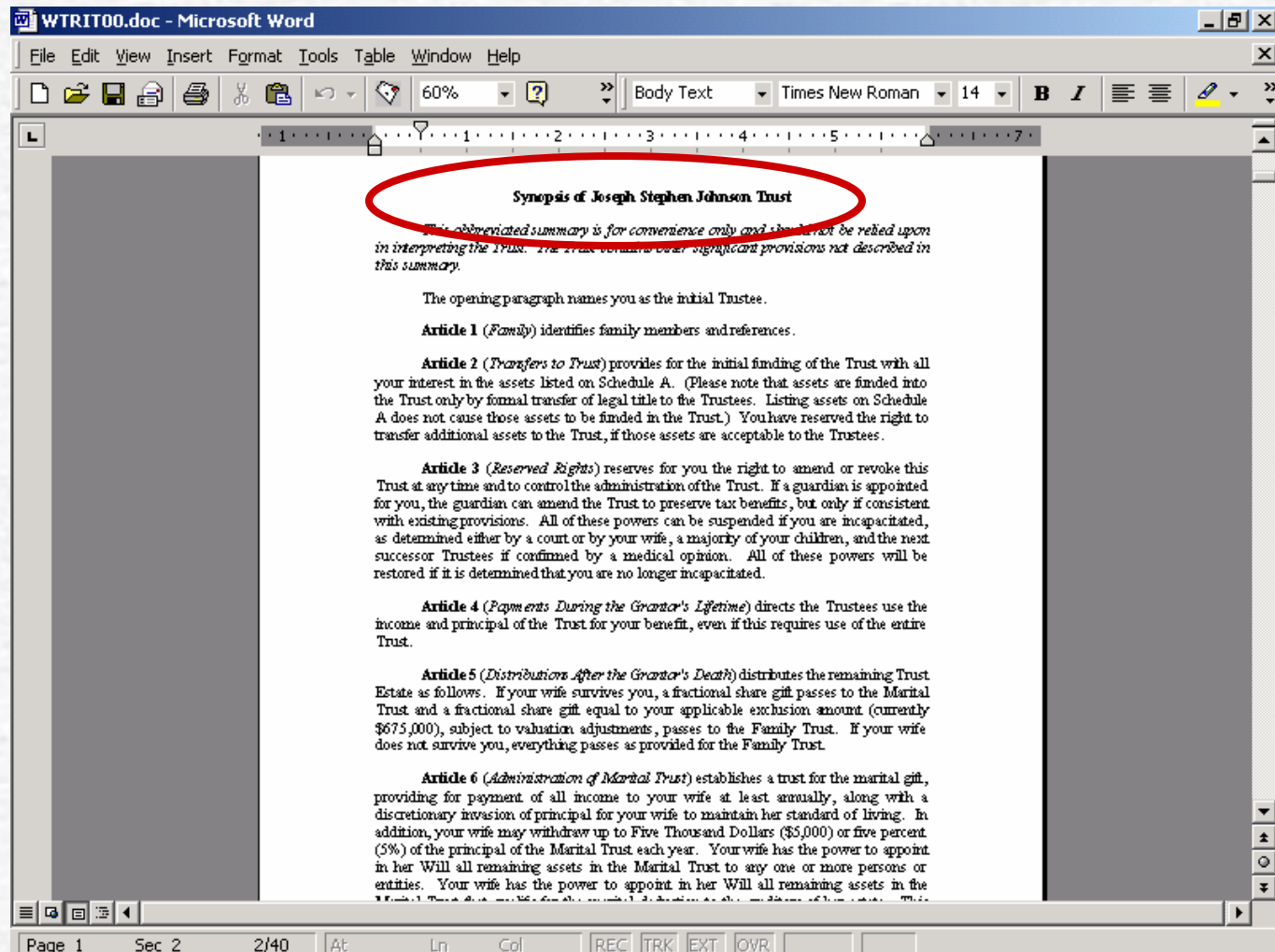
## *Creating Document and Opening Word Processor*

✓ This is the cover page of the trust that was just created.

✓ Lawgic works with either *Word* or *WordPerfect*.



✓ All estate planning programs create a *Synopsis of the will or trust for your client.*

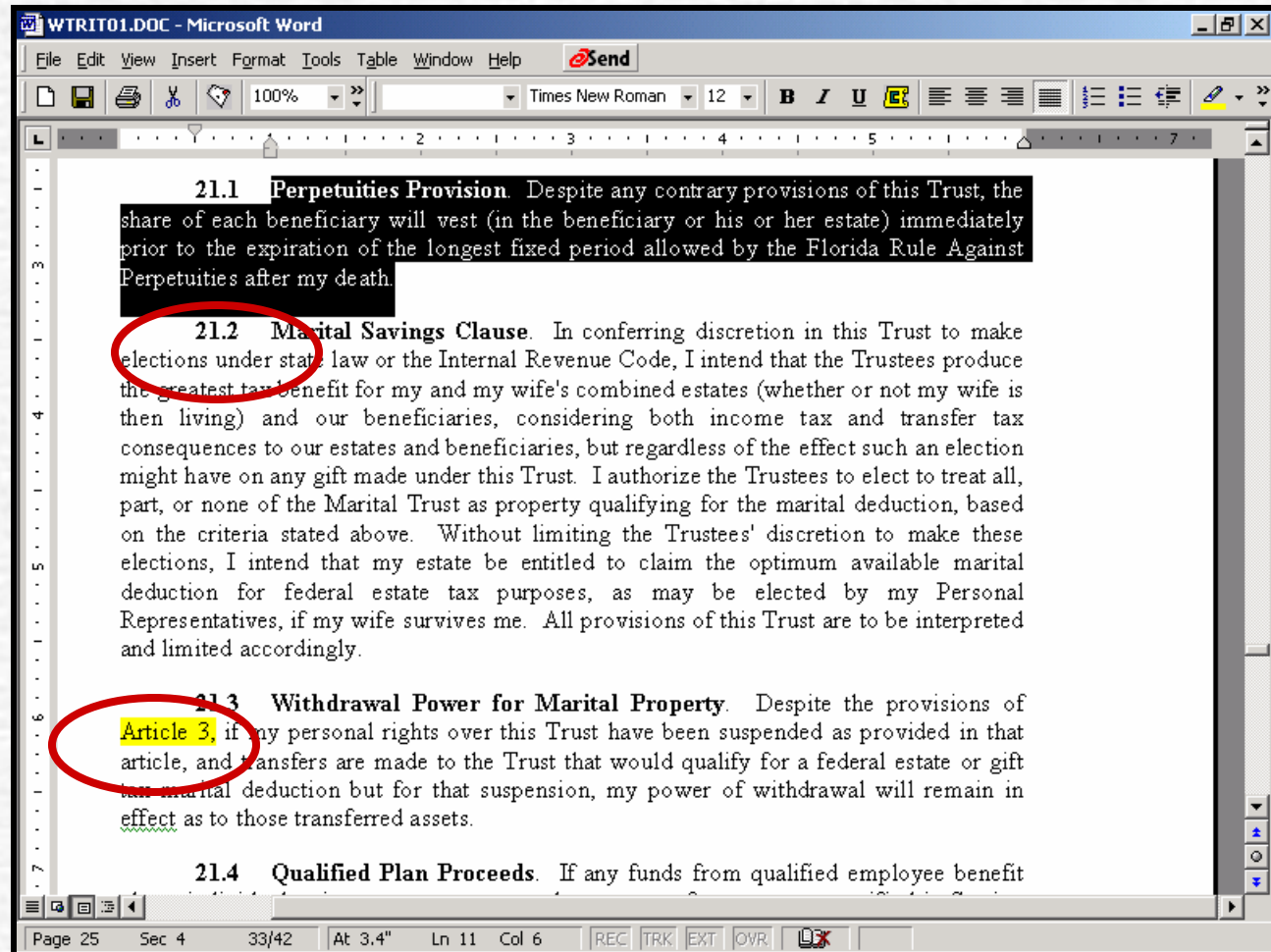




## Automatically Renumbers When You Edit Your Document!

✓ Lawgic uses advanced formatting and autonumbering, which means...

✓ ...when you add, move or delete paragraphs, Lawgic automatically renumbers BOTH the paragraphs and cross-references!





# Table of Contents with Autonumbering

✓ In addition,  
....Lawgic  
*renumbers  
the Table of  
Contents*  
saving you  
time to focus  
on serving  
your clients  
rather than on  
formatting  
documents!

WTRIT00.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help eSend

75%

**TABLE OF CONTENTS**

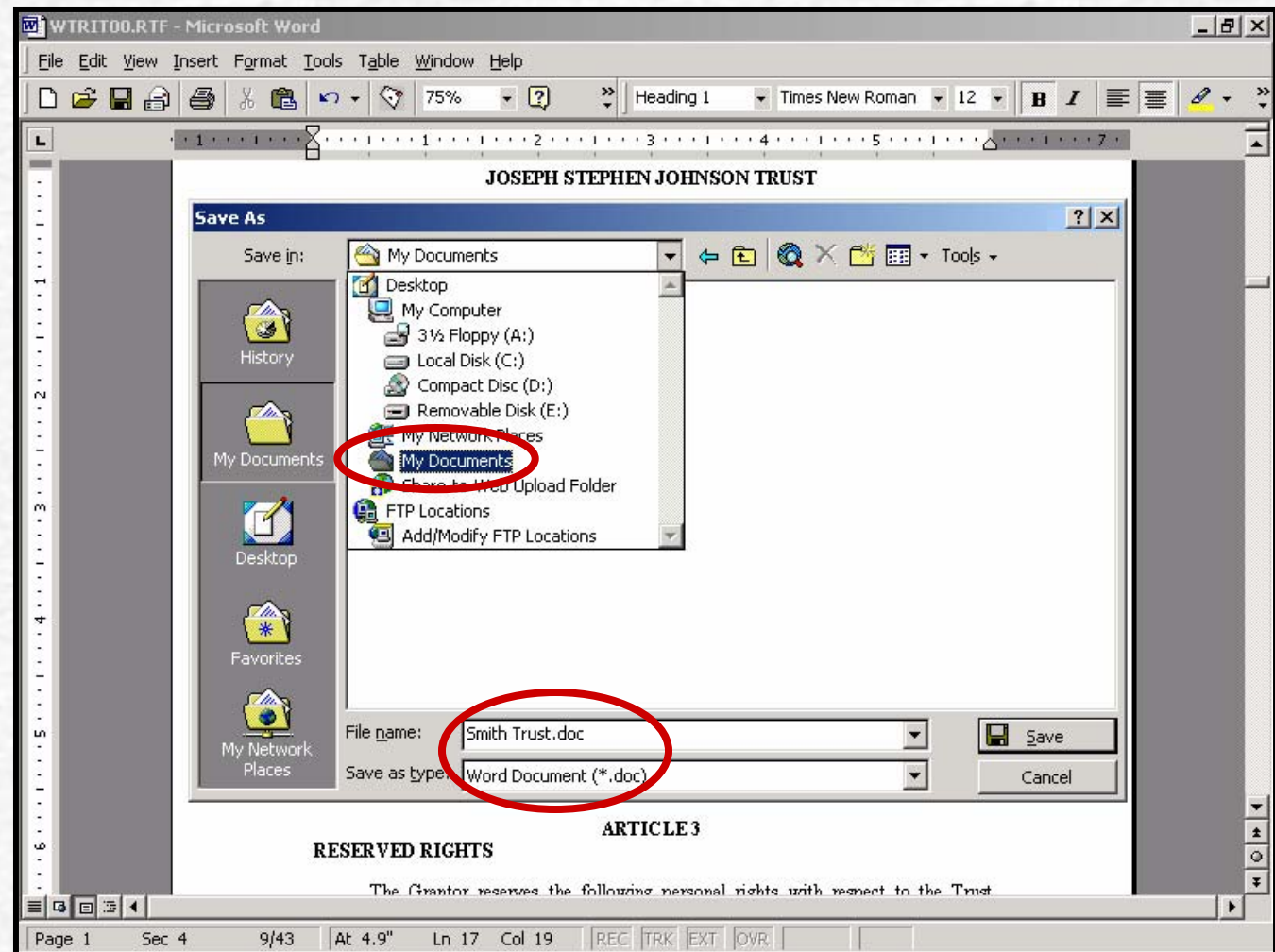
Article 1 Family.....	1
Article 2 Transfers to Trust.....	1
Article 3 Reserved Rights.....	1
3.1 By Whom Exercisable.....	2
3.2 Suspension of Rights.....	2
3.3 Homestead Rights.....	2
Article 4 Payments During My Lifetime.....	3
Article 5 Distributions After My Death.....	3
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5.2 If Wife Survives.....	3
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6.3 Withdrawal Rights.....	4
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7.1 During Wife's Lifetime.....	5
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Page i Sec 3 5/42 At 1" Ln 1 Col 18 REC TRK EXT OVR

## Naming and Saving Document In Your Word Processor

✓ Once you are done editing, *name and save your document* as you normally would.

✓ Lawgic also works with most *document management systems, such as Worldox.*





# Ready to Create Your Next Document!

✓ At the opening menu, you are ready to *create your next document*, such as....

✓ Lawgic uses answers that you have already given, so you *only need to answer a few more questions to create your next document!*

The screenshot shows the Lawgic software interface for 'Florida Wills & Trusts - Smith'. The main window is titled '#1 Select an Activity' and contains a list of activities: How To, Wills, Trusts, DPAs and Related Documents (selected and circled in red), Ancillary Documents, Letters, and Worksheet. Below the list are 'Previous' and 'Continue' buttons. A yellow callout box with an arrow points to the selected option, containing the text: **...the Durable Power of Attorney, which is the answer choice here.**

The left sidebar shows a 'Navigator' tree with the following structure:

- Title Page
- Select an Activity
- Wills
- Trusts
- DPAs and Related Docts
- Ancillary Documents

The bottom of the interface has tabs for 'Progress', 'Law & Strategy', 'Notes', and 'Question Help'. The 'Notes' tab is active, displaying text about 'DPAS AND RELATED DOCUMENTS' and 'ANCILLARY DOCUMENTS'.

✓ Answer files can be *saved as a template to be reused for future clients* with a similar estate planning scenario.

✓ All estate planning products have an automatic *'Template Assistant'* feature to assist you in creating templates quickly and easily!

**✓ Selecting 'Clear Client-Specific Answers' deletes ONLY client-specific info but saves all other answers, thus reducing the time it takes to create documents for your next client.**



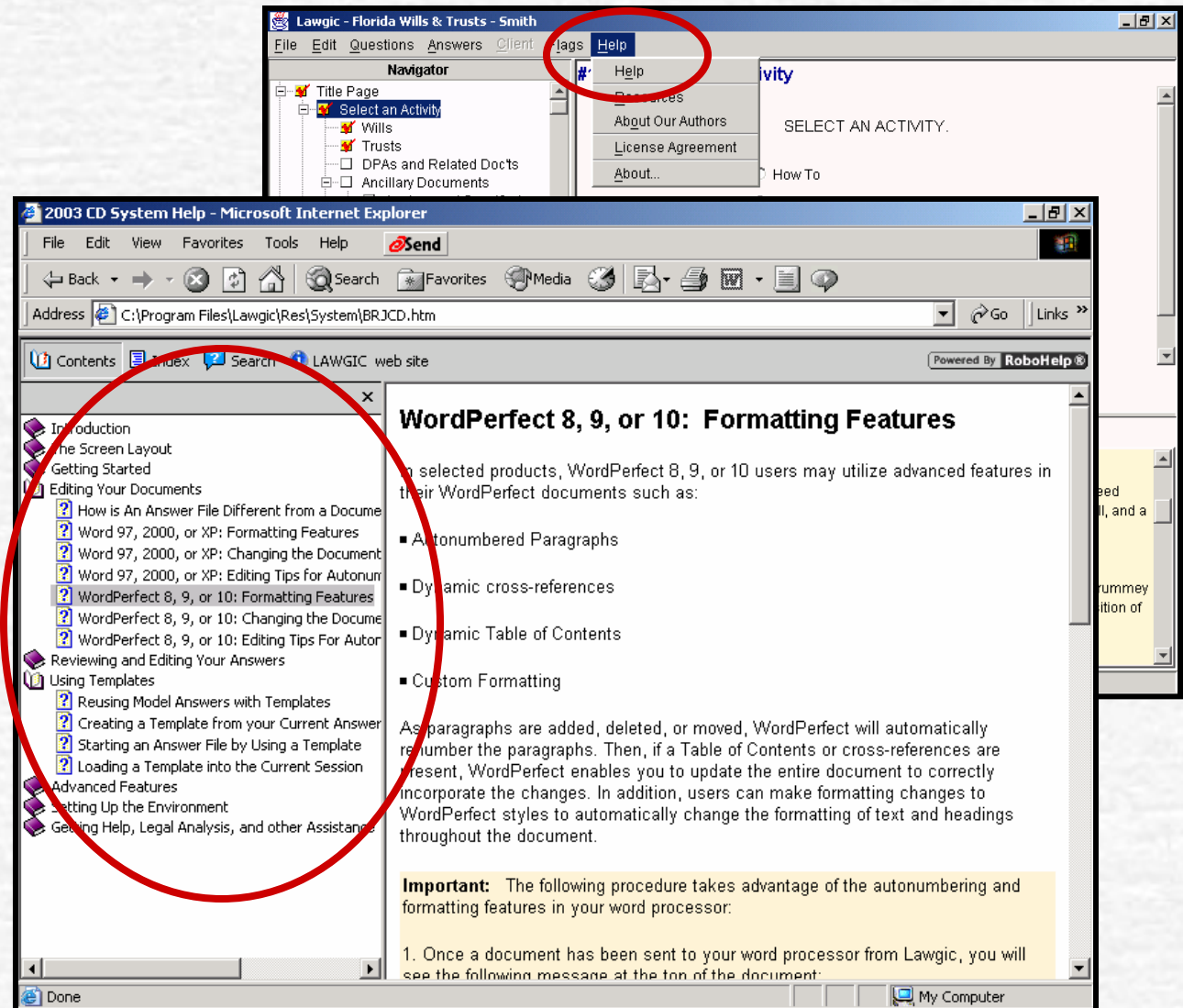


## Getting Help...

Lawgic provides several types of HELP.

*General system HELP* includes topics such as:

- ✓ *Getting Started*
- ✓ *Editing Your Documents*
- ✓ *Using Templates*

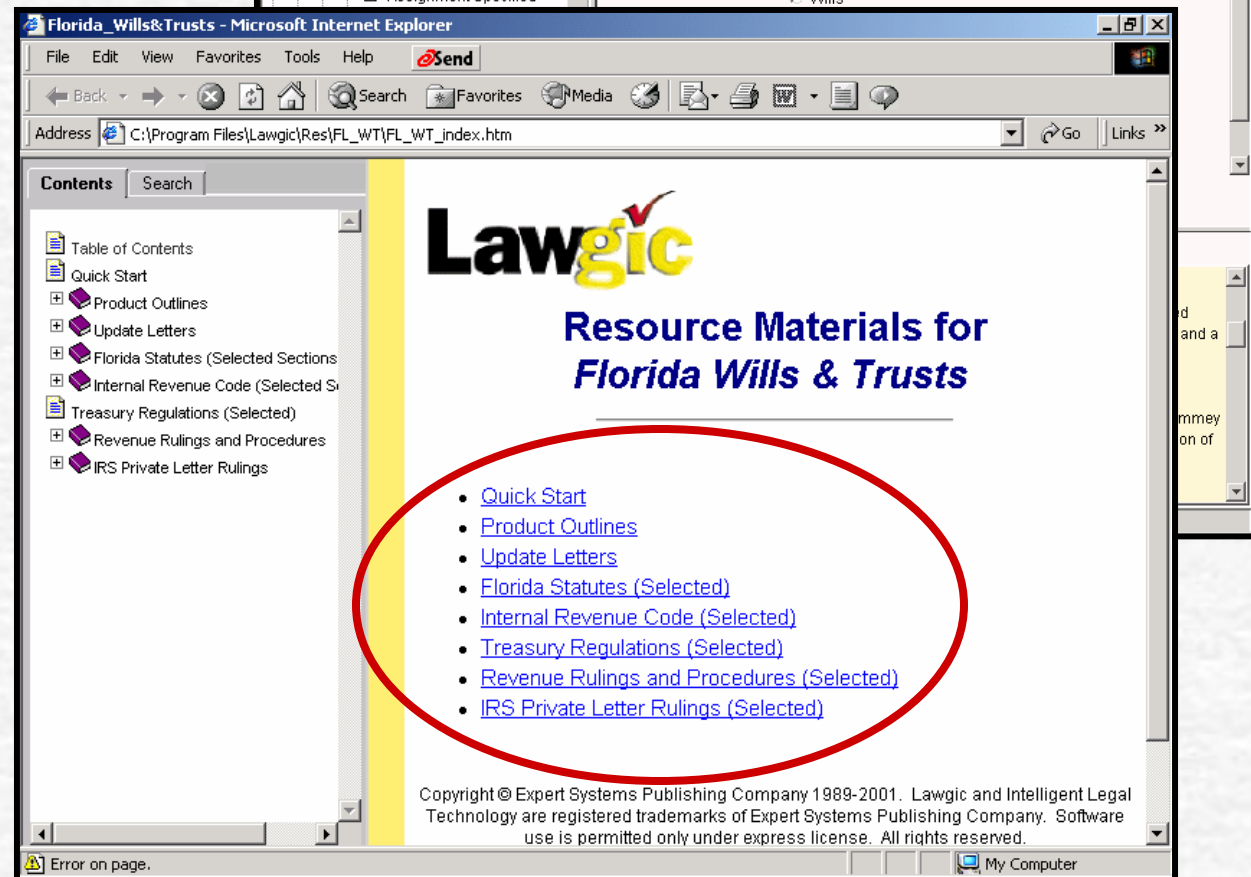
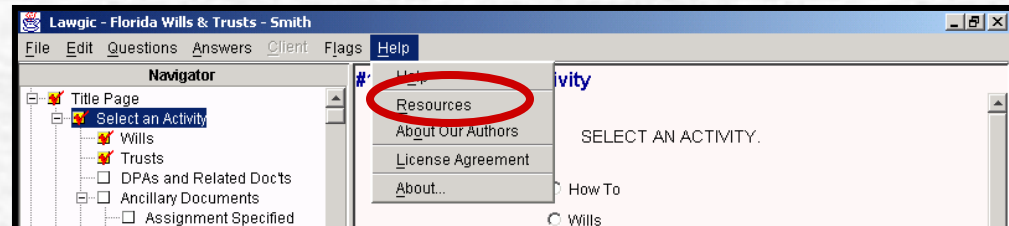




## Product Resource Library

*Help Resources* is title-specific and includes:

- ✓ *Quick-Start Guide*
- ✓ *Product Update Letters*
- ✓ *Full-text of relevant cases*
- ✓ *Internet links to statutes and regulations, including the full text of the Probate Code*





## 'How To' Help on Estate Planning Topics

'How To' HELP is an additional feature for estate planning products and includes topics such as how to:

- ✓ Draft a Rev. Proc. CRT
- ✓ Mirror documents
- ✓ Create various trusts on death
- ✓ Draft an Irrevocable Trust

The top screenshot shows the 'Select an Activity' screen with the following options:

- How To
- Wills
- Trusts
- DPAs and Related Doc'ts
- Ancillary Documents

The bottom screenshot shows the 'How To' screen with the following options:

- Create custom provisions
- Create simple documents
- Create various trusts on death
- Create your own templates
- Draft a Rev. Proc. CRT
- Draft and print multiple documents
- Draft an Irrevocable Trust

The bottom screenshot also shows a 'Progress' tab with the following text:

**CREATE VARIOUS TRUSTS ON DEATH**

**Marital Trust:** Select any choice other than "No provision for spouse" at Question 266 ("Marital Gift"). Then select "QTIP trust" or "Power of appointment trust" at Question 273 ("Marital Gift Outright or Trust"). The actual terms of the Marital Trust are addressed beginning at Question 356.

**Family (Bypass or Credit-Shelter) Trust:** Select "Tax formula" at Question 266 ("Marital Gift"). Then select "Trust for spouse and descendants" at Question 269 ("Balance of Estate"). The actual terms of the Family Trust are addressed beginning at Question 295.

**GST Exempt Trust:** If the client is married and you want to create a GST Exempt Trust on the client's death regardless of whether the client or the spouse dies first, select "Tax formula" at Question 266 ("Marital Gift"), select "Residuary gift" at Question 268 ("Tax Formula for Marital Gift"), and select "GST-exempt trust" at Question 269 ("Balance of Estate").



## *You have seen how Lawgic...*

- ✓ *Is easy to use with its intuitive yet powerful Q&A format...*
- ✓ *Reduces the time it takes to draft high quality and accurate documents tailored to your client's needs...*
- ✓ *Ensures your documents reflect the latest federal and state legal developments....*
- ✓ *Helps control the costs of practice to keep its delivery affordable...*

**Now hear what your  
colleagues say!**



✓ ***“What sets Lawgic apart from most respected print and CD-ROM-based treatises....is how it combines the research and drafting steps into a single action.”***

*Anthony Aarons, Reviewer, California Law Business*

✓ ***“I enjoy using Florida Wills & Trusts. The pricing is extremely competitive, and I do not think that you will find another program that uses more sophisticated or elegant provisions.”***

*Sole Practitioner, Jacksonville, FL*

✓ ***“Whether you are new to this practice area or an expert, California Wills & Trusts has everything you need.”***

*Partner, San Francisco law firm*

✓ ***“Clients are astounded with the speed and thoroughness with which I can draft marital settlement and prenuptial agreements. Lawgic software is a win/win for practitioners and clients alike.”***

*Past Chair, Los Angeles County Bar Family Law Section*



*Intelligent Legal Technology®*

## What Does It Cost?

- ✓ *Between \$595-\$1,960 per year, depending on the product, whether you are on a monthly credit card option or annual subscription basis, and whether you are a new customer or renewal.*
- ✓ *The product **pays for itself** with one client billing!*
- ✓ *More importantly, hundreds of your colleagues agree that Lawgic is the **best document drafting tool on the market and the least expensive** costing thousands less than our competitors!*

Click here for...

- ✓ *Sample Documents*
- ✓ *Product Information*
- ✓ *Pricing and Order Form*

Thank you for viewing this demo.  
We appreciate your interest in Lawgic!