

# ProDoc California Update News

December 2009

## 2010 Judicial Council and Local Forms Updates

The enclosed CD contains revisions, additions, and deletions to our libraries of automated forms. Heavily influencing this update are the revisions pursuant to the 2010 Judicial Council updates as well as revisions to local forms. The affected volumes and overviews of the revisions include:

**Family Law** – We added 14 new Judicial Council forms and updated 27 Judicial Council forms in accordance with January 2010 changes. The new Judicial Council forms include *Proof of Electronic Service* forms and name change forms under the **Address Confidentiality Program**. We also updated and added local county forms in accordance with local forms update.

**Litigation** – We added 17 Judicial Council forms regarding proof of electronic service, respondent's notice regarding appeals, and a *Notice of Entry of Judgment or Order*. We also added seven local court forms and updated three mandatory local forms. Finally, we updated local forms in accordance with local forms update.

**Probate** – We added five Judicial Council forms regarding proof of electronic service and added 12 local court forms. We also updated local forms in accordance with local forms update.

**Business Transactions Solution** – We added additional statutory links into WestLaw® for 29 forms.

**Real Estate** – We added 64 local court forms, updated 78 local court forms as well as the *Statement of Partnership Authority*. We removed three local court forms that are no longer valid.

**Conservatorships** – We added five new Judicial Council forms and updated one Judicial Council form in accordance with January 2010 changes. These are proof of service forms with the five new forms focusing on *Proof of Electronic Service*.

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### Install this Update before January 1, 2010

This update contains form updates that are effective January 1, 2010. Please be sure to install it prior to this date so you don't forget to do so later.

But, since the changes are not effective until January 1, 2010 be sure not to install this update too early.

### Your ProDoc Installation KeyCode Is on the Shipping Envelope

You will need a 20-character **KeyCode** to install this update. You'll find it on the envelope in which the CD shipped. We strongly encourage to you keep the shipping envelope in a safe place so you have your KeyCode available when you install the update.

### ProDoc Enhancement

We added a feature that enables you to prevent ProDoc from populating your firm information into the documents you draft. To activate this feature, open ProDoc and click on **Customize► Firm Information**. Then click the checkbox next to **Do not use firm information default answers during document assembly**.

Click **OK** to save your change and to close the **Options and Settings** window.

### Your ProDoc Account Information Is Available Online

You can now go online and review your ProDoc subscription information, to find your Installation KeyCode, and your Registration Code(s). All this and more is available through MyAccount on the Thomson West web site.

Visit **MyAccount** at <https://myaccount.west.thomson.com/myaccount>.

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**Criminal Law** – We updated four Judicial Council forms in accordance with January 2010 changes. We also updated various local county forms and added one new form on mandatory declaration regarding traffic school.

**Federal Civil Litigation** – We updated five Administrative Office forms, including: *Application for Employment, Subpoena in a Civil Case, Bill of Costs, Application - Proceed without Prepayment of Fees and Affidavit, and Appearance of Counsel.*

**Federal Criminal Defense** – We updated nine forms with a minor fix to the jurisdictional description. We also updated four Administrative Office forms with minor changes, as well as the *Summons in a Criminal Case*, to which a page will now be added when the summons is to be filed under seal.

**Guardianships** – We added 10 Judicial Council forms regarding proof of electronic service and name change proceedings. We also added three local court forms and updated various local forms including one mandatory form.

**Juvenile Law** – We added five Judicial Council forms regarding proof of electronic service. We also added five local court forms, including one mandatory form, and updated five mandatory local forms.

**Landlord and Tenant** – We added five Judicial Council forms regarding proof of electronic service and one Judicial Council form providing information of legal rights for building owners and tenants. We also updated one mandatory local form.

**Workers' Compensation** - We updated two legacy forms under the rules and regulations of the **Electronic Adjudication Management System** project of the **Division of Workers' Compensation.**

**Attorney Client Matters** – We updated an existing attorney-client form with a minor enhancement per customer request.

**Lipman's Wills and Trusts** - The four major areas of this update are:

1. We added an option to six Irrevocable Trust forms enabling you to initially create a single, pooled trust rather than having the trusts held in individual trusts from the outset. You have the option, if you want, to create separate trusts from the outset, as creating a single initial trust is not required. In addition, we also modified each Memorandum Regarding Funding of Trust and each Withdrawal Letter associated with these irrevocable trusts to account for the possibility that the trust will be drafted as a single initial trust.
2. We added new questions in the Advance Health Care Directives so that you can choose to leave out the check boxes that appear in three different parts of the forms. You now have the option of adding a Supplemental Needs Trust (SNT) for the benefit of a spouse to the pourover wills rather than to the client's Revocable Trust. If you choose to add this trust, the will forms will provide that the decedent's entire probate estate (other than specific bequests) will pass to the SNT for the spouse. In addition, provisions can be added to the Husband and Wife's simple Revocable Trust forms which provide that the deceased spouse's property will be distributed to the testamentary SNT.
3. We renamed all of the Domestic Partner forms to Same-Sex Spouse//Domestic Partner forms. These forms are designed to be used for the following types of clients: (a) same-sex marriages; (b) registered domestic partners; and (c) any other situation where two people are providing for each other (and the two people can be two men, two women, or a man and a woman). Your clients will be able to refer to each other as my spouse, my husband, my wife, my partner, etc.

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