



## Four ProDoc Volumes Updated (Numerous Other Important Tweaks Included)

Here is a brief overview of the changes we made in our Texas volumes for this shipment:

- **Family Law** – We updated the IRS *Release or Revocation of Release of Claim of Exemption for Child*. You may now revoke a previously granted release using this form in addition to releasing the right to an IRS exemption.
- **Federal Criminal Defense** - We updated 18 AO forms based on changes to those forms by that agency. We also updated the *Credit Card Authorization Form-Fax Copies* pursuant to changes to this form as well.
- **Real Estate** - The cross-hatching on the newly redesigned HUD-1 interferes with the information that is entered. We updated the look of the new ProDoc HUD-1 forms to alleviate this issue.
- **Lipman's Wills & Trusts** – We made many significant enhancements to this volume, including:
  - (1)The section in certain Revocable Trusts called "Right to Use Principal Residence" has been expanded so that it now gives the primary beneficiary of each trust created thereunder the right to use and occupy the principal residence rent free and without charge. The purpose of this language is to allow a homestead owned by a trust to qualify for the homestead exemption for property tax purposes. All of the Revocable Trusts which contain separate share trusts contain this change. In addition, similar language has been added to all of the Will forms that create separate share trusts and to some of the irrevocable trusts as well.
  - (2)The Codicil forms have been improved so that you can now add as many changes as you like (formerly, you were limited to 4 changes) and you can now also delete a section from your client's will in addition to changing and adding a section.
  - (3)A new specific bequest has been added to all of the Will and Revocable Trust forms (except for Forms 11-1 and 14-1) allowing you to give away one or more pieces of non-homestead real estate. The bequests can be either: (i) a house with an address, (ii) a cooperative apartment, or (iii) a farm or ranch. You can add an unlimited number of these bequests to

### Your ProDoc Installation Key Code Is on the Shipping Envelope

You will need a 20-character Key Code to install this update. You'll find it on the envelope in which the CD was shipped. We strongly encourage you to keep the shipping envelope in a safe place so you have your Key Code available when you install the update. We also sent your Key Code to you via email and/or letter.

### Install this Update Today

Installing this update extends the registration license on your ProDoc so you don't have to worry about it timing out on you. Therefore, before you forget, we recommend that you install it right now.

And, after you install the update on this CD, be sure to accept any WebUpdates when they become available to you.

(continued from page 1)

each document

- (4) An option has been added to all of the Husband and Wife forms that create bypass and/or marital trusts. When adding a "five or five" power, you can now specify whether or not you want the power to be exercisable by a legal representative or an agent acting under a power of attorney.
- (5) In all of the Will forms, you will now be asked separate questions regarding the payment of compensation to executors and trustees. This will give you the flexibility to provide for different types of compensation.

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### We Also Included Numerous ProDoc Features Tweaks

- **Certified Mailer Update** - Since mail rates increase May 11, we inserted a feature that will automatically update the new postal rates on that date in your ProDoc Certified Mailer program.
- **WebUpdates Roll-up** - This will bring you current if you have not been accepting the WebUpdates.
- **Extend your Time-Out Period** - Installing this update will extend your time-out period in ProDoc.

### ProDoc Software Enhancements

- **64-bit Enhancement** - We're enhancing ProDoc to work better in a 64-bit computer environment.
- **Microsoft Office 2007 Compatibility** - If you have Microsoft ®Word 2007, ProDoc saved the completed document in the .DOCX format instead of the previous .DOC format. ProDoc now tells Word to save the completed document as a .DOC document.

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### Legislative Update

Remember that our commitment is to provide to you all of the hundreds, and perhaps thousands, of updated forms necessitated by 2009 legislation-prior to their effective date of August 31.

Our Texas Jurisdiction Leader reports that more than 7,000 bills have already been filed so far for this legislative session. Legislators had until Friday, March 13 (60th day), to file bills and joint resolutions other than local bills, emergency appropriations, or bills that have been declared an emergency by the governor.

We're watching every one of them for their possible affects on ProDoc forms.

### Understanding the Essential WebUpdate

We created the ProDoc WebUpdate feature to enable us to provide you quicker updates to form changes, minor fixes, etc. between the large CD updates. It is an essential tool to make sure your ProDoc forms are as current as possible.

If your computer is connected to the Internet it will complete a WebUpdate session the first time you open ProDoc each day. You can tell it is working when you see a small *Checking for Updates* window processing in the extreme lower right corner of your monitor when ProDoc opens. It will automatically close when there are no updates available and will proceed through the install procedure when there is something available.

If you have questions about the WebUpdate feature call our Technical Support department at 800-759-5418.

(continued from page 2)

### **ProDoc Moving to Greater Reliance on WebUpdate**

We expect that, in order to provide them to you by August 31, we will be working feverishly on recoding ProDoc forms for legislative actions until nearly the last moments of August. Therefore we expect to deliver to you some, and probably many, of the changes via WebUpdate after the CD ships to you.

Since this update will rely heavily on the WebUpdate process we recommend that:

1. Each computer/server/laptop with a ProDoc installation should have Internet access. If all your computers are on a network, only the server needs access to the Internet for the WebUpdate.
2. You provide for high-speed Internet access. Some of our updates are quite large and a dial-up connection will probably be quite impractical. And, a dial-up connection requires that you establish your Internet connection before opening ProDoc in order for WebUpdate to work, which you may forget to do.

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### **Beta Testers Needed for Enhancement to ProDoc and SOS**

We're making an enhancement to ProDoc and SOS to address issues experienced by some users. We're replacing the database files in ProDoc and SOS with a more robust product. This enhancement will also improve performance for larger firms.

We're asking for beta testers to assist with the roll-out of this product. Our Quality Assurance team has been testing this change for several months and is continuing to do so. But, the test that really counts is when customers put it through the paces.

The benefit to you is that you get some one-on-one time with key ProDoc staff as we work with you to install and monitor your progress. And, you'll probably find yourself receiving inside information about future ProDoc developments.

The only requirements for participation are that you or your staff regularly use ProDoc and/or SOS and that your computer runs Windows® 2000, Windows® XP, or Window® Vista.

If you wish to volunteer as a beta tester, please email Kristin Foster at

[Kristin.Foster@thomsonreuters.com](mailto:Kristin.Foster@thomsonreuters.com).

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