

## Update Information for the California Wills & Trusts Drafting System

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### Updates for Release 27

#### January 2015

- Updated content in the Acknowledgment. Amendments to Civil Code Section 1189 require that an introductory advisory appear "at the top of the certificate of acknowledgement in an enclosed box." The language that has been added (in a box, as required) is "A *notary public or other officer completing this certificate verifies only the identity of the individual who signed the document, to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.*"
- An additional update for [HotDocs Player 11](#) has been posted; this update provides support to WP7 as well as fixes for assembly errors that have been experienced in WP5 and WP6.

#### August 2014

- Improved automation in the Revocable Trust or Amended and Restated Revocable Trust. Note: An update for [HotDocs Player 11](#) has been posted; this update will fix the grayed out "Add Another" button in the "Successor Trustees" dialog, allowing multiple successors or sets of successors to be entered.
- Improved automation and updated content in the Certification of Trust by Trustees — the Successor Trustee and Trustee Powers sections in the Certification will now more closely follow the Revocable Trust.
- Improved automation in the Durable Power of Attorney, Advanced Health Care Directive, Acknowledgment, and Enter Law Firm and Attorney Information Intake.

#### May 2014

- Improved automation in the Revocable Trust or Amended and Restated Revocable Trust and updated formatting in the Table of Contents and the Trustees Article to match current document standards.
- Improved automation in the Acknowledgment — A new "Partially Automated" option has been added to the Acknowledgment. Selecting "Partially Automated" produces an automated version of the acknowledgment that replaces the variable information in the acknowledgment—the signature date, names of persons appearing (along with professional titles, as appropriate) and notary and county information. All associated pronouns (e.g., he/she/they) and plurality (e.g., name(s), capacity(ies)) will remain unautomated.

### Substantive Questions

For questions about the *legal substance* of the HotDocs Software and not about *technical support*, please contact the *California Wills & Trusts Drafting System* helpline.

Phone: (800) 424-0651 ext. 3365 (voice mail only, checked daily)

E-mail: [CWT@lexisnexis.com](mailto:CWT@lexisnexis.com)

### Contacting Technical Support

Technical Support is available 24 hours a day, 7 days a week. When calling for technical assistance, please be at the computer on which the program is running, and please have your account number, found on your packing slip, ready.

Phone: (800) 223-5297

E-mail: Visit our [LexisNexis Knowledge Base](#)

All information provided in this document is general in nature and is provided for educational purposes only. It should not be construed as legal advice. For legal advice applicable to the facts of your particular situation, you should obtain the services of a qualified attorney licensed to practice in your state.

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To suggest an enhancement, report a bug, or send comments, visit our [LexisNexis Knowledge Base](#) or call:

(800) 223-5297 to speak with Technical Support, if you are having a problem running the program;

(800) 833-9844 to speak with a Customer Service Representative; or

(800) 424-0651 ext. 3365 (voice mail) for questions regarding legal substance only.

NOTE: THIS PROGRAM IS INTENDED FOR USE BY LICENSED ATTORNEYS. IT IS NOT A SUBSTITUTE FOR INDEPENDENT THINKING. YOU SHOULD FAMILIARIZE YOURSELF WITH RELEVANT STATUTES, CASE LAW, AND STANDARDS OF PRACTICE. SINCE ESTATE PLANNING IS AN INDIVIDUALIZED SERVICE, YOU SHOULD THOROUGHLY REVIEW ALL GENERATED DOCUMENTS. IT IS LIKELY YOU WILL NEED TO MODIFY THE DOCUMENTS TO MEET THE NEEDS OF YOUR CLIENT.