



(CFP) Charitable Financial Planner (Desktop) version 2021.00 has been released and is available for download in your Portal Dashboard.

Please [Submit A Support Ticket](#) with any additional questions.

Release Notes:

Version 2021.00 (Released 2/15/2021)

- **Income Tax Adjustments:** New Income Tax Adjustments have been added for 2021.
- **Estate Tax Exclusion:** The Estate Tax Exclusion for 2021 (\$11,700,000) has been updated.
- **AFR:** The popup form that shows the historical AFR and §7520 rates have two new features:
 - Manual download of the AFR Rate file.
 - FAQs about the AFR Rate.
- **AFR - Automatic Download Feature:** At the start of CFP, the AFR did not automatically download the file until you clicked on a different model than what was initially loaded (CRAT). Once you clicked on a different model the automatic download occurred. This feature has been modified to ensure download at program startup.
- **Results Not Current Alert:** CFP now has an alert that appears at the top of the screen when an input has changed.
- **Optimization Alert:** Models with the Optimization function now have a message to indicate that user needs to recalculate the optimized results.
- **New Release Information:** A new link can be found in the "Help" menu. This new feature displays a screen with the version Release Notes.
- **Economic Schedules for CRAT, CRUT, CLUT, CLAT:** For a single life case where the age is 108/109, the duration of the schedule is based off the truncated Life Expectancy. For these ages, it resulted in the schedule not being updated. These ages now illustrate a one-year schedule.