



(ECPL) Estate & Charitable Planner LIVE version 2021.11 has been released and is available for download in your Portal Dashboard.

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

Release Notes:

Version 2021.11 (*Released 02/28/2021*)

- **NEW UI/UX:** Main Menu has been redesigned for easier navigating.
- **Factors Model:** We updated the input for the FMV/Payment input to allow dollars and cents. Prior versions only allowed a dollar format.
- **Rolling GRAT:** The Remainder to Beneficiary Report - In the first year that excess was transferred, a growth value (equal to the growth rate entered) was being used (for instance, if you entered 6%, a \$6 growth was added in the first year). Years after the first year were properly illustrating the growth. Schedules that had \$0 in a field were shown as blank (NULL) - this has changed to illustrate \$0 in these cases.
- **Estate Model:** The amount entered in Outside of State Property was not adjusting the state tax due for a decoupled state, except for MD and NY. The "workaround" was to use the state credit input field to adjust the tax. This has been resolved, and "workaround" steps are no longer necessary.
- **FastPlan:** The first to die's DSUE (when applicable) was using the Adjusted Prior Taxable Gifts input to assume that the Unified Credit Used was always the maximum amount based on the entered Adjusted Prior Taxable Gifts. This is the case for most analyses, but the model has been updated to reflect when the maximum is not assumed.