



(KEA) Kugler Estate Analyzer™ (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 02/26/2021*)

- **§1.401(a)(9) Table:** This has been updated to reflect changes for 2022+ (RMDs).
- **Estate Tax:** The library calculations have been updated for 2021.
- **AFR:** The popup form that shows the historical AFR and §7520 rates now has two buttons that appear. One is for manually downloading the AFR file, and the other is a FAQ regarding AFR topics.
- **New Release Information:** A new link can be found under the "Help" menu. This new feature pulls up a list of items that have changed for the given version. By default, the program will load this screen when you run the program. You can turn this off by unchecking a box near the bottom of the form.
- **AFR: Edit Menu:** A new section has been added to help with AFR issues.
- **Summary Report:** This has been modified to illustrate charitable bequests from the Calculation Assumptions screen.
- **Calculation Assumptions Screen:** Previously, when prior taxable gifts were entered, it was assumed that the Deceased Spousal Unused Exclusion was based on the Prior Adjustable Gifts always utilizing the maximum Unified Credit allowed. This is the case for most case analyses, but the program now adjusts the DSUE based on the taxable gifts in line with the Unified Credit entered on this screen.
- **Analysis of Taxes at Death Report:** A few additional result entries have been added to show the flow of taxes.
- **Open and Save Icons:** These icons on the speed bar were erroneously disconnected. The user had to use the "File" menu or F2/F3 in order to use those functions. This has been resolved.