

# Documents On A Disk<sup>®</sup> Version 17.0

Version 17.0 of Documents On A Disk (DOD) contains 1,053 specimen documents organized into 182 document sets. In addition, the system contains 61 Flow Charts.

If you previously were licensed for version 16.0, you will notice we have added over 10 new document sets, and we've added over 150 new specimen documents. All of the documents from version 16.0 were reviewed and updated as needed as related to the Deferred Compensation Provisions of Section 409A and the Final Regulations as well as IRC Section 101(j) of the Pension Protection Act of 2006. (The "notice and consent" provisions of Section 101(j) affected over 100 document sets.)

***Note: These changes make all previous versions of Documents On A Disk obsolete. Please be certain not to use any of the documents from previous versions.***

The best way to review the general contents of DOD is by clicking on "Highlights Of The System" (the second menu item). For a review of all documents contained in the System, click on "List Of All Document Names" (the first menu item).

## **One very important feature of DOD is:**

You can export any document electronically to another party (for example, as an e-mail attachment to a client's attorney). Most attorneys appreciate electronic copies in addition to hardcopies so they can edit text without having it all re-typed. To export a file, be sure the specific file you want to export is highlighted and use "File/Export As" from the Toolbar.

## **Highlights of Version 17.0**

- **Fact Finders** - Business (short version); Estate Planning (short version), Estate Planning (comprehensive version) (3 new documents)
- **Modified Technical Prefaces in Business Buy-Sell Plans, Key Executive Plans, Executive Bonus Plans, Employer-Sponsored Split Dollar Plans, COLI Benefit Plans, Multi-Life Benefit Plans, Severance Pay Plans** (55 revised documents)
- **Modification of all documents in the Executive Trifecta document set to reflect different use by C Corporations, S Corporations, Limited Liability Companies, and Partnerships** (5 revised documents, 1 new document, 1 revised Flow Chart, 9 new Flow Charts)
- **Premium Payment Plans for Life Insurance in Trust** (10 new documents)
- **Section 2503(c) Minor's Trust** (5 new documents)
- **Disclaimer Trust** (5 new documents)
- **IRA Beneficiary Trust** - IRA Beneficiary QTIP Trust (Spouse and Children) and IRA Beneficiary Trust Non-Spousal Trust (12 new documents)
- **Charitable Trusts** - Inter Vivos Charitable Remainder Unitrust (Term of Years) and Testamentary Charitable Remainder Unitrust (Term of Years) (10 new documents)
- **Caregiver Employment Contract** (5 new documents)
- **Bill of Sale** (3 new documents)
- **IRS Prototype Trust Agreements** - Added to Charitable Trusts document sets. (6 new documents)
- **Modified documents within Individual Health Savings Account** (6 revised documents)
- **Modified Technical Prefaces within Corporate-Owned Life Insurance** (4 revised documents)
- **Special Files** - Company-Owned Life Insurance Summary, Notice and Consent Form, Annual Report Form and Deferred Compensation Provision of Section 409A (4 new documents)

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Documents On A Disk System for Windows requires: IBM-compatible computer; Pentium or higher processor; Windows 95, Windows 98, Windows 2000, Windows NT, Windows ME, or Windows XP; at least 35 MB of available hard disk space; 64 MB of installed RAM; CD-ROM drive.

The system is compatible with all Windows-compatible printers.

DOD 17.0 What's New.doc (5-29-07)