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May. 27, 2008

From the June/July 2008 [Review of Estate Planning Systems](#)

Brentmark Software's Estate Planning Tools provides an extensive collection of more than 100 calculation tools for estate-related planning, including GSTs, GRATs, GRITs and GRUTs, as well as Dynasty and Charitable trusts. The system also includes Estate Planning Techniques and tools for computing present and future value, retirement goals, taxes, valuation, net worth and other factors. With the addition of the State Death Tax Manager, the program can also help calculate state taxes on estates. The program costs \$439 (\$25 less if downloaded from the vendor's website) for a single-user license, which includes six months of program updates.

Brentmark offers several additional planning programs, including the Retirement Plan Analyzer, PFP Notebook, Kugler Estate Analyzer, Retirement Distributions Planner, Retirement Income Navigator, Charitable Financial Planner, Estate Planning QuickView and the Savings Bond Toolkit.

Ease of Use/Basic Functionality — 4 Stars

Brentmark's programs generally share a similar interface, with Estate Planning Tools opening to a primarily text-based screen that offers links to the key calculation models and related areas. These link areas are organized overall by those that fit into estate planning or financial planning functions, with additional grouping by key function areas, including categories for Valuation, Tools of Estate Planning, Trusts, and Charitable within the Estate Planning arena; and Estate Planning Techniques, Taxes, Retirement and Present/Future Value under the Financial Planning Tools section. Links to various specific

calculations are provided under each of these areas. As a helpful feature, hovering

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Many of the tools, such as for Goodwill Valuation, Capitalization and charitable planning, also include graphs of the calculated data. The graphical and numerical data can be printed directly from these screens or saved for future use. The Estate Planning Tools program does not provide a client selection list, but client records can be saved into a traditional Windows Explorer format, allowing creation of folders for each client with subsidiary plans and calculations.

Calculations — 5 Stars

Brentmark has loaded its Estate Planning Tools system with a pretty exhaustive array of calculation models, with more than 100 total options in 15 areas, including Trusts, Tools of Estate Planning, Charitable, Planning Techniques, Retirement, Taxes, Present/Future Value Calcs, Valuation, Investment, Inflation, Real Estate, Insurance, Net Worth, Financial Goals and Budgeting. The Trusts area includes GRATs with year-by-year reporting, GRITs, GRUTs, QPRTS and Dynasty trusts.

Charitable

options include CRATs, CRUTs, CLATs, CLUTs and gift tax exclusions. Additional calculations include split interest, IDITs, bypass trusts and 303 stock redemptions.

Additionally, financial planning models include investment calculators, inflation estimators, real estate functions, net worth analysis and projections, a portfolio analyzer, financial goal measurement and planning, and budgeting (including income, expenses and cash flow reports).

Client Presentation Tools — 4 Stars

The system offers a basic reporting utility that includes the ability to customize fonts and margins, create custom headings or make a few optional adjustments, and all of the information screens in the program offer printing options. Information screens are laid out in summary report format, while detail screens and graphical output options are also available, and all reporting can be generated directly

from each of the screens. No batch reporting options are offered. Reports can

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and information on estate tax changes, retirement planning and federal rates.

Relative Value — 4.5 Stars

Brentmark's Estate Planning Tools offers a comprehensive set of calculation tools at a very affordable price point, with client-ready graphs and charts available for many of the planning tools. The program is best suited to smaller firms, but it can manage complex scenario planning.

2008 Overall Rating:

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