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# Brentmark Software, Inc. — Estate Planning Tools & The Kugler Estate Analyzer

<http://www.Brentmark.com> 800-879-6665

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Brentmark Software's Estate Planning Tools, including The Kugler Estate Analyzer (Kugler), is similar to their many other software offerings. It offers a WYSIWYG, straightforward approach with easy-to-follow data-entry concepts. Offering a no frills user interface, the program runs on Windows 95 or newer operating systems and requires 5MB of hard disk space.

## **Comprehensiveness, Reliability & Ease of Use – 4 Stars**

Brentmark utilizes a "Building Blocks" model for creating scenarios, from the very simple to very complex. The system functioned very reliably and provided accurate answers to the numeric computations I fed it. Estate Planning Tools now includes 100 planning models.

## **Calculations – 4 Stars**

I was able to create estate plans with various, different interrelated scenarios. The program handles all the important estate planning techniques, enabling the user to quickly create plans under various scenarios. My sample client information was answered with correct program calculations. As well, it offers the ability to modify program calculations as to future changes in estate tax law.

### **Customization, Flexibility & Features – 4.5 Stars**

Kugler's "Building Blocks" approach proved itself to be adequate in providing flexible, custom plans. However, I was unable to create a very simple plan of splitting an estate between a child and grandchildren after payment of estate taxes. The program allows for modifications to future changes in the law. Among the various techniques/scenarios included are Credit Shelter Trust, Life Insurance Trust, Marital QTIP Trust, GST Trust, QPRT, GRAT, Rolling GRAT, CRAT, CLAT, CRUT, Sale to Grantor Trust, Family Limited Partnerships, Special Use Valuation, Outright Gifting and Annual Exclusion Gifts.

### **Client Presentation Skills – 4 Stars**

Kugler Estate Analyzer provides one report, but multiple reports with differing scenarios can be created and saved for each client. As well, output can be saved in \*.PDF or \*.RTF formats. I would have expected more in the way of connectivity, etc. The program creates traditional flowcharts, which can be easily understood. In addition, the planning models included with Estate Planning Tools offer reports, graphs and detailed explanations for client presentations.

### **Company History, Support & Help – 4 Stars**

Brentmark has been in the estate, financial and retirement planning software business for 20 years. In addition to the two products reviewed here, the company offers a number of other related products. Brentmark provides online context-sensitive help and live technical support. Users can update the programs via program patch files available for download from the Brentmark web site. As well, an extensive glossary provides explanations for technical terms.

### **Relative Value – 4 Stars**

Estate Planning Tools is available in a single-user license for \$395; a 10-user license costs \$790. The Kugler Estate Analyzer is a very good value at \$595 for a single-user license; a 10-user license costs \$1,190. All licenses include six months of maintenance.

Article

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