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CCH Tax and Accounting's entry into the estate planning market, ViewPlan Advanced, runs under Windows 95 or newer operating systems and requires a Pentium processor, VGA display, CD-ROM drive and a minimum of 14MB of hard disk space. I interviewed several users who were happy with the product. One said, "It took 10 minutes to learn and is very user friendly." Another user commented that the program is very fast, but that "there's no good place to put annuities." However, this user also pointed out that tech support "offered some good suggestions to correct the issue we had." Finally, another user said, "It can do simple or complex calculations — whatever you need."

Comprehensiveness, Reliability & Ease of Use – 4.5 Stars

At startup, the user is greeted by a simplistic initial interface. I confess that I thought ViewPlan might have a rather (limited) canned approach. Not so! What looks like a brief and simple program is supported by detailed and complex data-entry input and options, all of which deliver comprehensive answers. Data input of assets are specifically assigned to the owner by use of drop-down menus. Most items of data input are placed where the user would expect to find them; others are not, such as date of death. A quick call to the technical support team provided the answer, though. QuickPlan, an alternate means of input allows users a simple means to enter client data and provides fast, accurate answers.

Calculations – 4.5 Stars

ViewPlan Advanced provides detailed and accurate computations with support for complex techniques, including those involving popular intra-family and charitable transfer techniques. My sample client information was answered with correct program calculations. I found marital deduction planning to be especially good through the variety of built-in calculations that are automatically generated. As well,

ViewPlan Advanced offers the ability to modify program calculations as to future

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Client Presentation Skills – 4 Stars

ViewPlan Advanced provides visually motivational graphs, flowcharts and explanatory text, coupled with spreadsheet-format printed reports that include customizable text. It also includes a built-in library of reports.

Company History, Support & Help – 4.5 Stars

CCH Tax and Accounting has long been a provider of tax and business law software, research and information.

A team of accountants and attorneys oversees the development and support of ViewPlan Advanced. Online context-sensitive help is available, as well as a Program Quick Tour and toll-free technical support.

Relative Value – 4 Stars

Priced at \$1,490, ViewPlan Advanced offers the user an excellent value in the program's ability to quickly create and generate professional, sophisticated reports and visual aids.

2005 Overall Rating – 4.5 Stars

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