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Estate Planning Software Review 2005 – Executive Summary

All of the Estate Tax Planning Programs reviewed here certainly got the job done. Some worked better with my word processor of choice, some offered slide shows, some offered wizards, and some offered stand-alone calculation utilities, etc. All had a different user interface.

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So what does this mean to you? It means that variety is very much alive among available Estate Tax Planning programs. That variety insures that there will be a program-of-choice for every planner.

Whether you are a novice or an experienced estate planner, there is no substitute for taking a “demo ride.” All products reviewed here offer free trial programs, either directly downloadable from the Internet or through e-mail contact via the vendor web site.

Estate Tax Planning software shares an attribute with any other practice software that is successfully utilized. The major cost is in program selection, in training to the program's use and behavior, and in adapting and integrating the client database to effectively create completed reports that convey the message and information we wish to convey to clients.

Article

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