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Estate Planning Systems

This is an impressive crop of products, each representing a unique approach to the multi-faceted problem of financial and estate planning. The product ratings below are classified according to the six basic criteria chosen for evaluation and review purposes. The reviewed packages included a range of functionality, and each will attract a different type of practitioner and addresses somewhat of a different need.

There are packages that are more oriented toward pure calculations, while others are more geared toward client presentation and deliverables, with explanatory text, graphs and flowcharts. Another difference in the various products is their topical coverage. Some vendors in this lineup are focused on estate planning alone, while others take a broad topical approach that includes education, retirement, estate planning and more. You'll want to consider your firm's needs and pick the package that meets your requirements best. □

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