CCH, a Wolters Kluwer business — ViewPlan Advanced

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CCH's ViewPlan Advanced is a professional system designed to focus specifically on estate planning and gift taxation as methods of reducing or eliminating wealth transfer taxes. The program offers full support for the spectrum of family, grantor and charitable trusts, as well as pooled income funds. It provides scenario creation tools that enable comparison of various plans and the effects of variables on outcomes. The system can be used to generate an unlimited number of plans for any number of clients with graphically enhanced output and auto-generated explanatory text for client communications and reporting. Support is available for federal and all state (plus D.C.) inheritance taxes. ViewPlan Advanced costs $1,659 per year for a single user; additional networkable licenses can be added.

In addition to the ProSystem *fx* suite of accounting products, CCH also produces several other planning-related publications and programs, including the Federal Estate and Gift Tax Reporter, the Financial and Estate Planning Library and the Estate & Gift Tax Module for ProSystem *fx* Tax.
ViewPlan is one of only two programs in this review (along with BNA's system) that is developed by a vendor who also offers estate and gift tax return preparation programs.

Ease of Use/Basic Functionality — 4.5 Stars
The primary interface for ViewPlan Advanced provides a full screen with traditional pull-down menus across the top, a customizable navigation control panel below these menus, a work area taking up the bulk of the window, and a vertical side menu that gives access to the system's core feature areas: The Client list, Estate Details, Plans, Comparisons and Presentations.
Client plans are saved in a Windows Explorer format within "Databases" that can contain multiple clients and client files.

ViewPlan Advanced's client selection function allows searching by a variety of information and provides sorting and filtering options. When client files are opened or created, an additional icon-based toolbar is available, giving access to planning-specific functions, such as calculators, notes, customizable shortcuts, and access to charts and graphs. The work screen within a client plan defaults to the Basic Flowchart, from which the user can easily access and enter estate details, compare the plan with other scenarios, or run reports.
An array of "quick calculators" is available, allowing the user to see the basic effects of variables on estate tax, GST or gift tax related issues.

Data-entry subwindows provide intuitive forms with pull-down selection lists where applicable. During entry of Estate Details, for instance, users can select from several pre-defined asset types or create their own, while also having the option to view a QuickPlan View or a Detailed View. ViewPlan Advanced can support an unlimited number of assets for each client in 10 categories. The QuickPlan View displays a simple summary of client data, while the Detailed option enables drilldown capabilities.

Additionally, tabs provide an easy way to move between data-entry tasks, such as when entering beneficiaries, when the user can move between General Information,
the Client's Estate, Spouse Estate and QTIP. Up to three client plans can be viewed, side-by-side, at any time or printed on the Comparison Report.
ViewPlan Advanced can be used in conjunction with CCH's Tax Research Network and other offerings, alerting users to potential tax issues and providing an easy-to-access research function. The system Calculation Log maintains a full-time audit trail that shows all of the calculations that went into arriving at specific results.

Calculations — 5 Stars
Calculations are made in real-time as data is entered and transferred throughout an applicable plan while updating all dynamic visual presentations. ViewPlan Advanced can handle virtually all types of advanced asset transfers, including CRATs, CRUTs, NIMCRUTs, CLATs, Simple CLATs and CLUTS, GRATs, GRUTs, QPRTs, GRITs, SCINs, Installment Sales and Individual Private Annuities. Each of the plans prepared through the system can be reviewed.

Client Presentation Tools — 5 Stars
ViewPlan Advanced has great client deliverable reports and computerized presentations
that can include multiple options for visual elements, including bar and line charts, pie graphs and other items. The system includes pre-created customizable text for many of the reports, helping to explain to clients the meaning and significance of certain variables and outcomes, which can further aid in illustrating the benefits of establishing particular types of trusts depending upon their unique situation. Reports can be exported into Microsoft Word and PDF and can import/export to and from alternative planning formats like Beneview and Factuary. The program also provides two-way integration with many of the programs in the ProSystem fx line.

Help, Support & Training Options — 5 Stars
The ViewPlan Advanced program includes ample assistive features and a Help utility, in addition to in-program access to research, content and support links. The company's online support center provides FAQs, program updates, electronic user manuals and tutorials available in video, audio and PDF format. Technical support is included with the program. Various live and web-based training options are available, including sessions at the company's annual user conference.

Relative Value –4. 5 Stars
Ideally suited to firms that have high net worth clients with complex asset bases, ViewPlan Advanced provides a wealth of capabilities, enabling the creation of virtually any type of estate, with scenario tools that help ensure that the most beneficial plan is put into place. The system can run as a standalone or networked program. For firms already using ProSystem *fx* programs, ViewPlan Advanced is a natural addition to their practice, but it can provide an equally substantial benefit to all higher-end practices.

2008 Overall Rating:

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