with Estate Tax Planners.

I was reviewing comparative scenarios involving use of GRIT, GRAT & GRUT when my brain had a DIRECT SKIP. I mean, why explore the State of Estate Tax Planning Software at a time when the House of Representatives has just passed a Bill to repeal the Federal Estate Tax? Don't look now, but the Senate is working on similar legislation.

Everyone knows that with the repeal of the Federal Estate Tax there will be no need to plan for the demise of our clients, right? Well, maybe I had better think this one through … I suppose all who plan to plan, need to do so.

Of course, there will be some states to not follow suit, and they'll retain their State Estate Tax. So we'll have planning opportunities there. But will that be enough to support maintenance and evolvement of software? What about tools like life insurance to fund estate taxes and tax savings-motivated transfers to charity? Yes, they will be affected, but perhaps not as much as one might think. Are tax savings motivations the only reasons that life insurance policies are purchased or gifts made to charity? Certainly not.

Thus, it seems that Estate Planning is well and alive, and we will have plenty of reasons to have our trusty Estate Planner on our computers! Gifts, transfers in trust, succession, education needs, etc., are but a few of the reasons that exist to assist clients with their future planning. We will need software tools to compute, quantify, compare, present ideas, and convey explanations concerning possible Estate Planning alternatives to our clients! It looks like the "State of the State" on Estate Planning says "full speed ahead!"

Estate planners will require many of the same program features in selecting planning software, while at the same moment they will be looking for other features or program methods/techniques to satisfy individual practice needs. Some needs are

part. This learning experience comes by virtue of a supplied glossary and output visual aids that will not only convey an explanatory message to the client, but for the "less initiated" practitioner as well. Such features that can assist in educating the practitioner, such as a Glossary, are real bonuses.

CCH Tax and Accounting – ViewPlan Advanced

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.
Read Full Review

Thomson West – Intuitive Estate Planner

Thomson West's Intuitive Estate Planner (IEP) is designed in an "at-once-familiar" tab-driven, Windows toolbar approach in its user interface. The Intuitive Estate Planner runs under Windows 98 (but not with data on a Novell network), ME, 2000 and XP and requires a display that supports at least 800×600 resolution, a CD-ROM drive and 100MB of hard disk space.
Read Full Review

BNA Software – BNA Estate & Gift Tax Planner

The BNA Estate & Gift Tax Planner is the leader in estate tax planning, which is something we have come to expect from a recognized name and leader in all types of tax
planning. This spreadsheet program is driven by solid foundations. The BNA Estate & Gift Tax Planner is a consistent application, enabling confident

presentations. If you have used any other BNA program, you will immediately be

Emerging Information Systems Inc. – NaviPlan Standard

NaviPlan is offered in two versions: Standard and Extended. NaviPlan's Estate Planner is but one part of NaviPlan, which is known for its lengthy and detailed input. Why lengthy and detailed?
Read Full Review

Thomson Fast-Tax — zCalc Tool Box Suite

Thomson Fast-Tax offers the zCalc Tool Box Suite, a collection of analytical programs and other tools that act as an add-on to Microsoft Excel, providing additional assistance to estate planning professionals through features that enhance tax and estate planning strategies.
Read Full Review

EstateWorks 2005 – Estate Planning Module

This product was not reviewed, but information was provided for our reader's benefit. The recent release of a new Estate Planning Module in EstateWorks 2005 is a significant enhancement to the online program's unique workflow management software for professionals offering trust and estate services.
Read Full Article

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.