

# Summary of Trusts and Estates Law Practice Software

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## I. Estate Planning

### A. General Calculations and Illustrations

<u>Programs</u>	<u>Web Site URL</u>	<u>Publisher</u>	<u>Telephone #</u>
BNA Estate Tax Planner	www.bnasoftware.com	BNA Software	(800) 372-1033
DecoupleCruncher	www.leimberg.com/Dcspecial	Leimberg & LeClair, Inc.	(610) 924-0515
EPLAN	www.brentmark.com	Brentmark Software	(800) 879-6665
Estate Planning Tools; Estate Planning QuickView	www.brentmark.com	Brentmark Software	(800) 879-6665
Estate Planning System	www.estateplanningsystem.com	2007 Real Law Forms	(877) 284-7897
Estate Tax Analysis	www.advancedimpact.com	Impact Technologies Group, Inc.	(800) 438-6017
ES: The Estate Plan Analyzer	www.superior-software.com	Superior Software, Inc.	(800) 421-3264
Fast Tax FPS	www.probate-software.com	Thomson Fast-Tax	(888) 706-1041
Intuitive Estate Planner	www.west.thomson.com	West Group	(800) 344-5800
Kugler Estate Analyzer	www.brentmark.com	Brentmark Software	(800) 879-6665
NumberCruncher; Estate Planning QuickView	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
TrustWise 4.0	www.osisoftware.com	OSI Software	(800) 650-4334
TValue 5	www.timevalue.com	TimeValue Software	(800) 426-4741
ViewPlan and ViewPlan Advanced	www.tax.cchgroup.com	ViewPlan Division of CCH Inc.	(888) 224-7377
WealthTec Foundation & Wealth Master	www.wealthmaster.com	WealthTec LLC	(443) 535-8675
zCalc (Excel Spreadsheet Add in)	www.zcalc.com	Thomson Fast-Tax	(800) 331-2533

### B. Charitable Giving

<u>Programs</u>	<u>Web Site URL</u>	<u>Publisher</u>	<u>Telephone #</u>
Charitable Financial Planner	www.brentmark.com	Brentmark Software	(800) 879-6665
Crescendo Pro, Lite, Estate, Plus, Admin and Presents	www.crescendosoftware.com	Crescendo Software (Comdel, Inc.)	(800) 858-9154
Estate Planning Tools	www.brentmark.com	Brentmark Software	(800) 879-6665
NumberCruncher; Charitable Financial Planner	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
PGCalc Planned Giving Manager & Mini Manager; GiftCalcs	www.pgcalc.com	PG Calc Inc.	(888) 497-4970
PhilanthroCalc for Windows and Web	www.ptec.com	PhilanthroTec	(800) 332-7832
Tiger Tables	www.tigertables.com	Tiger Tables Software	None Provided
TrustWise 4.0 Gifting Module	www.osisoftware.com	OSI Software	(800) 650-4334
ViewPlan and ViewPlan Advanced	www.tax.cchgroup.com	ViewPlan Division of CCH Inc.	(800) 224-7377

### C. Retirement Planning

<u>Programs</u>	<u>Web Site URL</u>	<u>Publisher</u>	<u>Telephone #</u>
NewRMD.com and RMD Calculator	www.newrmd.com	Brentmark Software	(800) 879-6665

NumberCruncher; Retirement Plan Analyzer	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
PenD'Calc R&EP	www.pendcalc.com	PenD'Calc Corporation	(800) 766-7327
Pension Dist. Planner	www.brentmark.com	Brentmark Software	(800) 879-6665
PensionPlanners.com	www.pensionplanners.com	Brentmark Software	(800) 879-6665
Retirement Plan Analyzer (Pension & Roth IRA Analyzer)	www.brentmark.com	Brentmark Software	(800) 879-6665
Roth 401K.com	www.roth401k.com	Brentmark Software	(800) 879-6665
RothIRA.com	www.rothira.com	Brentmark Software	(800) 879-6665
<b>D. Tax Utilities (factors, rates, other calcs)</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
Calc Tool.com	www.brentmark.com	Brentmark Software	(800) 879-6665
Estate Planning Tools	www.brentmark.com	Brentmark Software	(800) 879-6665
Inter-Est	www.inter-est.com	Cammack Computations Co.	(800) 594-5826
IRS Factors Calculator	www.brentmark.com	Brentmark Software	(800) 879-6665
IRS Interest and Penalties Calculator	www.brentmark.com	Brentmark Software	(800) 879-6665
NumberCruncher; IRS Factors; Charitable Financial Planner	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
Tax Interest	www.timevalue.com	TimeValue Software	(800) 426-4741
Tiger Tables	www.tigertables.com	Tiger Tables Software	(314) 552-6187
ViewPlan and ViewPlan Advanced	www.tax.cchgroup.com	ViewPlan Division of CCH Inc.	(800) 224-7377
zCalc (Excel Spreadsheet add in)	www.zcalc.com	Thomson Fast-Tax	(800) 331-2533
<b>II. Document Drafting</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
American Academy of EP Attorneys - AAEP	www.aaepa.com	AAEPA	(800) 846-1555
Amicus Attorney	www.amicusattorney.com	Gavel & Gown Software	(800) 472-2289
Cowles Trust Plus (all 50 states and DC)	www.cowleslegal.com	Thomson West	(800) 227-0721
DL: Drafting Libraries	www.draftinglib.com	Attorney's Computer Network, Inc.	(610) 347-1500
Document Production System (all 50 states)	www.dps8.com	Advanced Logic Systems	(800) 454-7703
Documents On Disk	www.insmark.com	InsMark Inc.	(925) 543-0500
Drafting Wills and Trust Agreements (Wilkins/Jordan)	www.west.thomson.com	West Group	(800) 227-0721
EP Expert (WinDraft)	www.lawtech.com	Eidelman Associates	(734) 769-1500
Estate Planning	www.easysoft-usa.com	Easy Soft. Inc.	(800) 905-7638
Estate Planning System (EPS)	www.reallawforms.com	Real Law Forms	(801) 766-8178
Estate Planning, Wills and Living Trusts	www.lawfirmsoftware.com	Ruth Technology Corp.	(800) 350-8262
Estates and Trusts Forms Manual	www.knowlespublishing.com	Knowles Publishing, Inc.	(800) 299-0202
GhostFill, Automated Wills	www.ghostfill.com	Korbitec, Inc.	(905) 286-1888
HotDocs	www.hotdocs.com	LexisNexis	(800) 500-8627
Lawgic (CA, FL, GA, MD & NY)	www.lawgic.com	Lawgic, LLC	(877) 252-9442
Practical Guide to Estate Planning 2008 Edition	www.CCHGroup.com/EstatePlan	CCH	(800) 248-3248
ProDoc System for Florida, Texas, and California	www.prodoc.com	ProDoc, Inc.	(800) 759-5418

Quicken Lawyer fka Nolo Press WillMaker & WillMaker Plus	www.nolo.com	Nolo Press	(800) 728-3555
WealthDocs (HotDocs & MS Word)	www.wealthcounsel.com	WealthCounsel, LLC	(888) 659-4069
Wealth Transfer Planning (Blattmachr & Graham)	www.ilsdocs.com	InterActive Legal Systems	(888) 315-0872
WILLPower	www.taxcut.com	H&R Block	(888) 482-9288
WTrust	www.puritas-springs.com	Puritas Springs Software	(330) 278-3252
<b>III. Probate Administration Forms</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
AZ Probate Partner	www.avidlaw.com	AvidLaw, LLC	(480) 361-1324
CourtLink	www.courtlink.com	LexisNexis	(888) 311-1966
Cowles TrusTerminator	www.west.thomson.com/cowles	Thomson-West	(800) 227-0721
Document Production System (various states)	www.dps8.com	Advanced Logic Systems	(800) 454-7703
FPS Calendar - Fiduciary Calendar & Tickler	www.fasttaxtrust.com/fps.htm	Thomson Fast-Tax	(800) 706-1041
FundingPro & SettlementPro	www.advancedplanningllc.com	Advanced Planning Solutions, LLC	(800) 300-0431
Lackner 6-in-1 Probate Forms	www.lacknergroupp.com	Lackner Group, Inc.	(800) 709-1041
LexisOne Free & Pay Forms (various states)	www.lexisone.com	LexisNexis	(800) 223-1940
LegalSolutions™ Plus	www.west.thomson.com	Thomson-West	(800) 344-5008
Probate System by ProDoc (FL, TX, & CA)	www.prodoc.com	ProDoc, Inc.	(800) 759-5418
ProbatePlus	www.estateworks.com	Estate Works, Inc.	(978) 461-1200
Quick and Easy Heritance Trust & Estate Administration	www.estatesuite.com	DataTech Software, Inc.	(800) 556-7526
<b>IV. Fiduciary Accounting</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
6-in-1 Estate Administration System	www.lacknergroupp.com	Lackner Group, Inc.	(800) 709-1041
FASTER	www.fastersystems.com	FASTER Systems, LLC	(508) 588-2034
Fiduciary Accounting	www.legal-automation.com	Legal Automation	(623) 523-7603
FPS Accounting	www.fasttax.thomson.com/fps.asp	Thomson Fast-Tax	(888) 706-1041
Gillete Estate Management Suite (GEMS) - Accounting	www.gillettublishing.com	Gillett Publishing, LLC	(970) 667-6223
TEdec Fiduciary Accounting System	www.tedec.com	TEdec Systems, Inc.	(800) 345-2154
Total Trust	www.exhibitonesoftware.com	Exhibit One Software	None Provided
TrustEase	www.fasttaxtrust.com	Thomson Fast-Tax	(888) 706-1041
<b>V. Asset Valuation</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
Appraise	www.appraisenj.com	Evaluation Services, Inc.	(888) 374-4706
Capital Changes On Line	www.capitalchangesonline.com	Evaluation Services, Inc.	(888) 374-4706
Estate Planning Tools	www.brentmark.com	Brentmark Software	(800) 879-6665
EstateVal (EVP) + CostBasis	www.evpsys.com	Estate Valuations & Pricing Systems, Inc.	(800) 323-7750
EE Bond, StampPro, CoinPro, BaseballPro	www.mmrsoft.com	MMR Software	(503) 686-9470

FPS - Fiduciary Practice System	www.fasttaxtrust.com	Thomson Fast-Tax	(888) 706-1041
NumberCruncher	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
Portfolio Evaluations	www.estatevalue.com	Estates, Evaluations & Estimates	(800) 597-0239
Savings Bond Toolkit	www.brentmark.com	Brentmark Software	(800) 879-6665
Wallace Software and Online Pricing System	www.financialdata.com	Financial Data Service, Inc.	(800) 762-5468
<b>VI. Tax Returns</b>			
<b>A. Tax Forms on CD ROMs</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
ATX Complete	www.atxinc.com	CCH	(877) 728-9776
e-Form	www.riag.com	Thomson RIA	(800) 950-1216
IRS Federal Tax Forms	www.irs.ustreas.gov	US Government Printing Office	(800) 829-1040
ProSeries	www.proseries.com	Intuit ProSeries	(800) 934-1040
SuperForm	www.stfservices.com	STF Services	(800) 541-7197
US Treasury Tax Products CD ROM - Pub 1796	http://bookstore.gpo.gov	Government Printing Office	(866) 512-1800
<b>B. Form 706 Death Tax Preparation</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
BNA 706 Preparer	www.bnasoftware.com	BNA Software	(800) 424-2938
Fast-Tax FPS Form 706	www.fasttax.thomson.com	Thomson Fast-Tax	(888) 706-1041
FASTER	www.fastersystems.com	FASTER Systems, LLC	(508) 588-2034
Gillete Estate Management Suite (GEMS) - Form 706	www.gillettpublishing.com	Gillett Publishing, LLC	(970) 667-6223
Lacerte Form 706	www.lacertesoftware.com	Lacerte Software Corp.	(800) 765-7777
ProSeries Form 706	www.proseries.com	Intuit ProSeries	(800) 934-1040
ProSystem fx Tax	www.tax.cchgroup.com	CCH	(800) 739-9998
Quik 706	www.lacknergroupp.com	Lackner Group, Inc.	(800) 709-1041
Quick and Easy Form 706	www.quickandeasy.com	DataTech Software, Inc.	(800) 556-7526
TaxWise 706	www.taxwise.com	Universal Tax Systems, Inc. (CCH)	(800) 755-9473
TEdec Fiduciary Accounting System	www.tedec.com	TEdec Systems, Inc.	(800) 345-2154
WorldWideWeb Tax Professional	www.wwwwebtax.net	WorldWideWeb Tax	(800) 953-1220
W706	www.puritas-springs.com	Puritas Springs Software	(330) 278-3252
<b>C. Form 709 Gift Tax Preparation</b>			
<b>Programs</b>	<b>Web Site URL</b>	<b>Publisher</b>	<b>Telephone #</b>
709 System	www.brentmark.com	Brentmark Software	(800) 879-6665
BNA 709 Preparer	www.bnasoftware.com	BNA Software	(800) 424-2938
Fast-Tax FPS Form 709	www.fasttaxtrust.com	Thomson Fast-Tax	(888) 706-1041
Gillete Estate Management Suite (GEMS) - Form 709	www.gillettpublishing.com	Gillett Publishing, LLC	(970) 667-6223
Lacerte Form 709	www.lacertesoftware.com	Lacerte Software Corp.	(800) 765-7777
ProSeries Form 709	www.proseries.com	Intuit ProSeries	(800) 934-1040

ProSystem fx Tax	www.tax.cchgroup.com	CCH	(800) 739-9998
Quik 709	www.lacknergroupp.com	Lackner Group, Inc.	(800) 709-1041
Quick and Easy Estate Practice	www.quickandeasy.com	Data Tech Software	(800) 556-7526
TaxWise 709	www.taxwise.com	Universal Tax Systems, Inc. (CCH)	(800) 755-9473
WorldWideWeb Tax Professional W709	www.wwwwebtax.net www.puritas-springs.com	WorldWideWeb Tax Puritas Springs Software	(800) 953-1220 (330) 278-3252
<b>D. Form 1041 Fiduciary Income Tax Preparation</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
Fast Tax FPS Form 1041	www.fasttax.thomson.com	Thomson Fast-Tax	(888) 706-1041
FASTER	www.fastersystems.com	FASTER Systems, LLC	(508) 588-2034
IRS Federal Tax Forms	www.irs.ustreas.gov	US Government Printing Office	(800) 829-1040
Lacerte Form 1041	www.lacertesoftware.com	Lacerte Software Corp.	(800) 765-7777
ProSeries Form 1041	www.proseries.com	Intuit ProSeries	(800) 934-1040
ProSystem fx Tax	www.tax.cchgroup.com	CCH	(800) 739-9998
Quik 1041	www.lacknergroupp.com	Lackner Group, Inc.	(800) 709-1041
Quick and Easy Form 1041	www.quickandeasy.com	DataTech Software, Inc.	(800) 556-7526
TaxWise 1041	www.taxwise.com	Universal Tax Systems, Inc. (CCH)	(800) 755-9473
TEdec Fiduciary Accounting System	www.tedec.com	TEdec Systems, Inc.	(800) 345-2154
WorldWideWeb Tax Professional W1041	www.wwwwebtax.net www.puritas-springs.com	WorldWideWeb Tax Puritas Springs Software	(800) 953-1220 (330) 278-3252
<b>VII. Research (on-line and CD-ROM)</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
CCH Internet Tax Research Network	www.tax.cchgroup.com	CCH	(800) 224-7377
Checkpoint	www.riag.com	Research Institute of America	(800) 950-1216
Kleinrock's Federal Tax Expert	www.kleinrock.com	CCH	(877) 728-9776
LexisNexis	www.lexisnexis.com	LexisNexis	(800) 253-5624
LISI - Leimberg Information Services Inc.	www.leimbergservices.com	Leimberg Information Services, Inc.	(610) 924-0515
Loislaw	www.loislaw.com	Aspen Publishers	(800) 364-2512
Practical Drafting on CD	www.ustrust.com	US Trust	(212) 852-1000
Tax Facts	www.nationalunderwriter.com	National Underwriter Co.	(800) 543-0874
Tax Notes Today; Tax Notes; One Disk	www.tax.org	Tax Analysts	(800) 955-2444
VersusLaw	www.versuslaw.com	VersusLaw, Inc.	(452) 250-0142
Westlaw + West CD-ROM Libraries	www.west.thomson.com	Thomson West	(800) 344-5008
<b>VIII. Case Management</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
AbacusLaw	www.abacuslaw.com	Abacus Data Systems, Inc.	(800) 726-3339

Amicus Attorney	www.amicusattorney.com	Gavel & Gown Software	(800) 472-2289
askSAM	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 527-5216
Connect2A	www.connect2a.com	Connect2A.com	(800) 288-9169
Lexis Front Office	www.timematters.com	LexisNexis	(800) 328-2898
ProDoc Small Office Suite (SOS) (FL, TX, & CA)	www.prodoc.com	ProDoc, Inc.	(800) 759-5418
<b>IX. Financial Planning</b>			
<b><u>Programs</u></b>	<b><u>Web Site URL</u></b>	<b><u>Publisher</u></b>	<b><u>Telephone #</u></b>
American Dream Planner	www.americandreamplanner.com	American Dream Planner, LLC	(866) 375-2589
Backroom Technician	www.kettley.com	Kettley Publishing Co.	(800) 777-3162
Cheshire Wealth Manager	www.cheshire.com	Cheshire Software	(800) 734-6734
ExecPlan	www.sawhney.com	The Sawhney Group	(888) 729-4639
Financial Analyzer II	www.leimberg.com	Leimberg & LeClair, Inc.	(610) 924-0515
MasterPlan	www.masterplanner.com	MasterPlan Financial Software	(800) 229-5080
Methuselah	www.methuselah.com	Financial Guidance Solutions, Inc.	(888) 864-3776
MoneyGuidePro	www.moneyguidepro.com	PIE Technologies, Inc.	(800) 819-2347
NaviPlan Suites (Standard and Extended)	www.naviplan.com	Emerging Information Systems Inc.	(888) 692-3474
PFP Notebook	www.brentmark.com	Brentmark Software	(800) 879-6665
RetireNow	www.scenarionow.com	ScenarioNow, Inc.	(815) 986-8380
ScenarioNow and RetireNow	www.tax.cchgroup.com	Tax.CCHGroup	(800) 449-8114
Silver Financial Planner	www.moneytree.com	Money Tree Software	(877) 421-9815
WealthMaster	www.wealthtec.com	WealthTec, LLC	(443) 535-8675
Note: Some of the preceding data was obtained, with permission, from lecture materials prepared by John L. Olsen, CLU, ChFC, Olsen Financial Group, for May 2003 Financial Planning Conference entitled "How To Choose Financial Planning Software."			