TRUST & ESTATE ADMINISTRATION

Estate Planner

The Estate Planner suite of ONESOURCE Trust & Estate Administration is a group of analytical products and tools to help you create, analyze, and present powerful tax and estate planning strategies. It provides vivid reports, graphs, and presentations to help walk clients through the estate planning process. With Estate Planner, you can effortlessly calculate different planning scenarios, explain complex concepts in a relatively simple manner, and create customized client presentations.

Estate Planner of ONESOURCE Trust & Estate Administration

Authored by renowned estate planning experts, the Estate Planner Tool Box is a set of spreadsheet-based models and calculations that analyze various tax and estate planning strategies.

Function Library

The function library is an add-in to Microsoft® Office Excel enabling you to perform estate, retirement, charitable, financial, and tax planning calculations right inside your own spreadsheet.

Templates

The templates are the same models and calculators contained in Estate Planner, presented in regular Excel spreadsheet templates. The templates are unlocked, so you can edit and customize them with the calculation power of the function library and the presentation power of Excel.

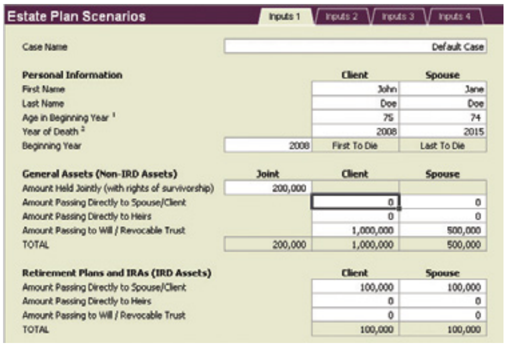
Presentations

Estate Planner provides a series of Microsoft PowerPoint slide shows covering many estate and charitable planning topics, including those strategies contained in Estate Planner. You can use these presentations to highlight your services to clients at seminars and trade groups.

With the Estate Planner suite of ONESOURCE Trust & Estate Administration, you can improve client satisfaction by easily creating individualized reports at a fraction of the cost of other computer-based estate planning programs.

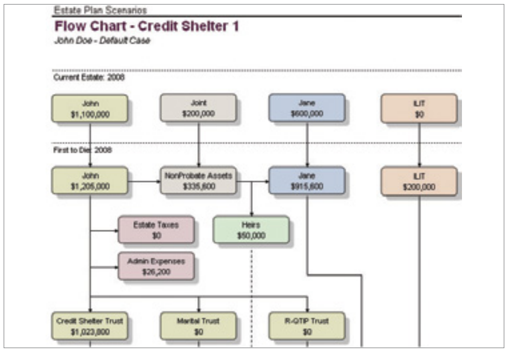
ESTATE PLANNER SUITE

- Authored by renowned estate planning experts
- Spreadsheet-based model and calculations analyze tax and estate planning strategies
- Easily create individualized client reports



Estate Plan Scenarios — Inputs 1 | Inputs 2 | Inputs 3 | Inputs 4

Case Name	Default Case		
Personal Information		**Client**	**Spouse**
First Name		John	Jane
Last Name		Doe	Doe
Age in Beginning Year [1]		75	74
Year of Death [2]		2008	2015
Beginning Year	2008	First To Die	Last To Die
General Assets (Non-IRD Assets)	**Joint**	**Client**	**Spouse**
Amount Held Jointly (with rights of survivorship)	200,000		
Amount Passing Directly to Spouse/Client		0	0
Amount Passing Directly to Heirs		0	0
Amount Passing to Will / Revocable Trust		1,000,000	500,000
TOTAL	200,000	1,000,000	500,000
Retirement Plans and IRAs (IRD Assets)		**Client**	**Spouse**
Amount Passing Directly to Spouse/Client		100,000	100,000
Amount Passing Directly to Heirs		0	0
Amount Passing to Will / Revocable Trust		0	0
TOTAL		100,000	100,000



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