

*Professional-Grade Estate Planners
need professional-grade insights. Where
our tools meet your skills, your clients'
goals are in clear view. EstateView.*

Getting Started Guide



Going Pro+ with EstateView

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Legal Disclaimers

The information provided in this guide is offered for general educational purposes only. This guide is intended to be used solely for operating *EstateView* software. It is not intended to constitute legal or financial advice, nor does it create an attorney-client relationship. Creating and making adjustments to a financial strategy or estate plan should only be undertaken after consulting with a licensed and trusted professional.

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Any questions, comments, or suggestions with respect to *EstateView* should be directed to Alan Gassman at agassman@gassmanpa.com.



EstateView Landing Page

The EstateView landing page is the central hub where the planner will interface with the software to create new plans and calculations, check up-to-date pertinent news and events, access previously created materials, and access helpful guides and informational materials.



Landing Page Sections

There are three main sections, a chat function, and a News tab within *EstateView*. We go over them all individually and in detail within the *EstateView Comprehensive Guide*. These functional areas are as follows:

- Comprehensive Plans
- Calculators
- Account
- Chat
- News

Comprehensive Plans

EstateView can help to create comprehensive plans, coordinating multiple calculations, based on the following modules:


- Single Clients
- Married Clients
- Sample Plans (for married and single clients)
- NEST Retirement Planning
- Life Insurance Estimation
- § 7520 & Applicable Federal Rate (AFR) Tables

Calculators

EstateView allows the planner to enter client information and run numbers and create illustrations for the following planning techniques:

- Large Gift / Spousal Lifetime Access Trusts (SLATs)
- Charitable Lead Annuity Trusts (CLATs)
- Self-Canceling Installment Notes (SCINs) and Conventional Notes
- Charitable Remainder Annuity Trusts (CRATs)
- Installment Sales with Income Tax Analysis
- Charitable Remainder Unitrusts (CRUTs) & Net Income Makeup CRUT (NIMCRUT)
- Qualified Personal Residence Trusts (QPRTs)
- Life Estate and Remainder Interests
- Private Annuity Planning
- Amortization
- Grantor Retained Annuity Trusts (GRATs)
- Life Expectancy
- Valuation Discount (Active Business)
- Valuation Discount (Investment Holding Company)

My Account

This section is where you can find help related to using the software, report issues, and contact *EstateView* for resolution of more complicated issues. You can also control your account settings and, when finished with a session, log out of *EstateView* from this section. Note, you can also log out by clicking the  button, on the bottom left corner of the landing page.

Help

The help section includes videos that describe the various planning techniques, which are provided for use with each calculator, explain the functioning of the *EstateView* software, and instruct planners in advanced practical uses of *EstateView*.

Detailed Instruction Manual

This section links you to the most current version of the *EstateView* Comprehensive Guide, where you may save it as a PDF file, print it, or just use it electronically while navigating the software.

RMD Calculator


The Required Minimum Distribution (RMD) Calculator allows the planner to run standalone calculations, outside of one of *EstateView*'s comprehensive planning tools, to determine the minimum distribution amounts that a client will need to take, for their age and fund value. The software also calculates charitable donations and the tax effect of these distributions over the client's life expectancy.

Logout

When planners finish working on client files and data, they should always ensure that they completely log out of *EstateView*. Exiting the window, alone, is never a recommended practice with any software that holds potentially confidential or privileged client data.

The *American Bar Association*, Standing Committee on Ethics and Professional Responsibility, has stated that "a lawyer may be required to take special security precautions to protect against the inadvertent or unauthorized disclosure of client information when required by an agreement with the client or by law, or when the nature of the information requires a higher degree of security." (Formal Opinion 477R, Revised May 22, 2017).

Planners can log out of *EstateView* using one of two methods:

1. Click the "Logout" button, under "My Account" on the middle portion of the landing page.
2. Click the  button, at the bottom left corner of the left-side Tab of the landing page.

News

EstateView users can click the fly-out Tab on the home page to display the current U.S. and world news in the areas of Business, Estate Planning, Economics, and other related topics.

- By selecting the drop-down, above each of the News Panes, you can choose the news source to display and select EstateView Chat to reside in your pane of choice, connecting you to professional legal-educated moderators and professionals.

The EstateView Comprehensive Guide

In addition to this *Getting Started Guide*, we have created a detailed step-by-step guide for planners to review and access while navigating *EstateView*.

The *EstateView Comprehensive Guide* is available in the *Help* section and can be accessed as needed or downloaded as a PDF file. As *EstateView* becomes updated with new functionality, newer versions of guides and other supplemental material are released via the *Help* section.





We sincerely thank you for giving us the opportunity to serve your planning software needs. EstateView aims to continuously adapt and improve with future iterations and provide additional content and options, based on the valued feedback of our professional users.

Please direct any questions, comments, or suggestions, with respect to EstateView, to Alan Gassman at agassman@gassmanpa.com.