

Large Gift / Spousal Limited (Lifetime) Access Trust (SLAT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Check Box to indicate Lifetime Exemption drops 50% in 2026 • Check Box to indicate whether to use Split Gift method • Estate Tax Rate • Inflation / Chained CPI Rate • Client Age • Table2010CM Life Expectancy • Illustrated Year of Death • Annual Savings/(Spending) • Current Investments • Investments Growth Rate • Annual Investment Tax Rate (as % of assets) • Year One Gift Amount 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Check Box to indicate Surviving Spouse • Tier 1 - Annual Savings/(Spending); Number of Years • Tier 2 - Annual Savings/(Spending); Number of Years • Tier 3 - Annual Savings/(Spending); Number of Years • Prior Gifts / Lifetime Exemption Already Used • Portability / DSUE • Value of Home • Home Value Growth Rate • Year to Toggle Off Grantor Trust Status 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Year One Gift Discount Rate (discounted asset) • Number of Children (Crummey Powers) • Year One Gift Reportable Value • Check Box to indicate Private Annuity Rescue <ul style="list-style-type: none"> ○ Starting Year ○ § 7520 Rate ○ Private annuity per million ○ Private annuity, number of millions ○ Annual annuity amount ○ Exhaustion Test Amount <ul style="list-style-type: none"> ▪ Required value ▪ Value at inception • Check Box to indicate SCIN <ul style="list-style-type: none"> ○ Year to start ○ Term of years ○ § 7520 Rate ○ AFR ○ SCIN per million ○ SCIN, number of millions ○ Annual payment amount

Self-Canceling Installment Note (SCIN) / Conventional Note		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • § 7520 Rate • Lowest Available AFR • Number of Lives • Grantor's Age (Nearest Birthday) <ul style="list-style-type: none"> ○ Grantor's Date of Birth • Table 2010CM Life Expectancy • Term of Note • Premium Type • Payment Type • Sale Value <ul style="list-style-type: none"> ○ Trust Value (SCIN Amount) 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Grantor Year of Death • Number of Years (illustrated) • Mortality Table selection • Self-Canceling or Conventional Note selection • Estate Tax Rate (%) • Asset Growth Rate • Year One Gift • Sale Value <ul style="list-style-type: none"> ○ Trust Value (SCIN Amount) ○ Show Grantor Pays Income Taxes? ○ Percent of Trust value that is Income ○ Income Tax Rate 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Year One Gift <ul style="list-style-type: none"> ○ Year One Gift ○ Year One Gift Discount Rate ○ Year One Gift Reportable Value • Sale Value <ul style="list-style-type: none"> ○ Discountable Assets (before discounting) ○ Discount Rate ○ Discounted Value ○ Non-discountable Assets ○ Combined Value before Discounts ○ Combined Value after Discounts • Additional Income <ul style="list-style-type: none"> ○ Annual Additional Income ○ Increase (%) per year of additional income ○ Income tax rate on additional income • <i>Coming Soon</i> - Leveraged GRAT w/ Installment Sale LLC

Installment Sale With Income Tax Analysis		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • General Info <ul style="list-style-type: none"> ○ Grantor's Age ○ Initial Assets ○ Annual Savings/(Spending) ○ Annual Growth Rate ○ Income Tax Rate ○ Lifetime Exemption Already Used • Sale/Note Info <ul style="list-style-type: none"> ○ Year One Gift Value ○ Year One Gift Discount Rate ○ Sale Value before/after Discount ○ Note Amount ○ Note Interest Rate ○ Type of Note (Conventional/SCIN) • Other Info <ul style="list-style-type: none"> ○ Estate Tax Rate ○ CPI Growth Rate ○ Note Term ○ Year to Toggle-off Grantor Trust Status ○ Number of Years (to project) 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> features available 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> or <i>Pro Plus</i> features available

Qualified Personal Residence Trust (QPRT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Transfer Date • § 7520 Rate • Number of Lives (one or two) • Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> ○ Grantor's Date of Birth • Term of QPRT (term of years) • Value of Home 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Life Expectancy (per IRS Table) • Grantor Year of Death • Number of Years (illustrated) • Mortality Table (Table Selection) 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Check Box to show income tax results <ul style="list-style-type: none"> ○ Tax Basis ○ Capital Gains Rate (%) • Home Value Considerations <ul style="list-style-type: none"> ○ Home Value Growth Rate ○ Gift Tax Rate ○ Estate Tax Rate • Discounted Asset Options <ul style="list-style-type: none"> ○ Ownership percentage ○ Valuation Discount Rate ○ Discounted Value ○ Annual Rent (% of value) ○ Rental Years (# following term) ○ Growth Rate on Rental Payments

Private Annuity		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • § 7520 Rate • Number of Lives (one or two) • Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> ○ Grantor's Date of Birth • Person 2 Age (if selected) • Deferral Period (years) • Payment Terms (level, graduated) • Sale Value <ul style="list-style-type: none"> ○ Trust Value 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Life Expectancy (per IRS Table) • Grantor Year of Death • Person 2 Year of Death (if selected) • Number of Years (illustrated) • Mortality Table (selection) • Estate Tax Rate • Annual Growth Rate • Year One Gift • Sale Value <ul style="list-style-type: none"> ○ Trust Value <ul style="list-style-type: none"> ▪ Grantor Pays Trust Income Tax? (Yes/No) ▪ Percentage of Trust Value that is Income ▪ Income Tax Rate 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Year One Gift <ul style="list-style-type: none"> ○ Discount Rate ○ Reportable Value (after discount) • Sale Value <ul style="list-style-type: none"> ○ Discountable Assets ○ Discount Rate ○ Discounted Amount ○ Non-discountable Assets ○ Combined Value Before/After Discounts • Annual Additional Income <ul style="list-style-type: none"> ○ Income Tax Rate on Additional Income • <i>Coming Soon</i> – Customizable Annuity Payment Amount

Grantor Retained Annuity Trust (GRAT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • § 7520 Rate • Term of GRAT (max: 300) • Payment Terms • Annual Growth Rate • Trust Value 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Grantor Age • Life Expectancy (per IRS Table) • Grantor's Year of Death • Number of Years (illustrated) • Gift Value Setting (\$ / %) • Target Gift Value • Trust Value <ul style="list-style-type: none"> ○ Show Grantor Pays Trust Income Taxes? ○ Percent of Trust Value that is Income ○ Income Tax Rate 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Contributing Discounted Assets <ul style="list-style-type: none"> ○ Discountable Assets (e.g. Corp) ○ Discount Rate ○ Discount Amount ○ Non-Discounted Assets (e.g. cash) ○ Combined value Before Discounts ○ Combined Value After Discounts ○ Annual Income in Addition to Percentage Growth ○ Annual Additional Income (e.g. dividends) ○ Income Tax Rate On Additional Income • <i>Coming Soon</i> - Leveraged GRAT

Rolling Grantor Retained Annuity Trusts (Rolling GRATs)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> This advanced calculator is only available under <i>Pro</i> and <i>Pro Plus</i> plans. <i>Standard</i> subscribers can access the basic GRAT features within the GRAT Calculator. 	<ul style="list-style-type: none"> All <i>Standard</i> Options Transfer Date § 7520 Rates Growth Rates Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> Date of Birth Life Expectancy (per IRS Table) Grantor Year of Death Number of Years (illustrated) Payment Terms Gift Value Setting (\$ / %) Target Gift Value Estate Tax Rate (%) Income Tax Rate (Times Growth Amount) Trust Value 	<ul style="list-style-type: none"> All <i>Standard</i> and <i>Pro</i> Options Contributing Discounted Assets <ul style="list-style-type: none"> Discountable Assets Discount Rate Value Before Discounts Value After Discounts

Charitable Lead Annuity Trust (CLAT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Transfer Date • Lowest Available § 7520 Rate • Term of CLAT • Payment Terms • Annuity Amount Setting (\$ / %) • Initial Annuity Amount • Annual Growth Rate • Trust Value 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Income Tax Treatment (Grantor/Non) • Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> ○ Grantor Date of Birth • Life Expectancy (per IRS Table) • Grantor Year of Death • Number of Years (illustrated) • Gifting Options <ul style="list-style-type: none"> ○ Gift Value Setting (\$ / %) ○ Target Gift Value 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Contributing Discounted Assets <ul style="list-style-type: none"> ○ Discountable Assets (e.g. Corp) ○ Discount Rate ○ Discounted Amount ○ Non-Discountable Assets (e.g. cash) ○ Combined Value before/after Discounts • Adjusting Time Value of Money <ul style="list-style-type: none"> ○ Time Value of Money (illustration rate)

Charitable Remainder Annuity Trust (CRAT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Highest Available § 7520 Rate • Term or Life <ul style="list-style-type: none"> ○ Term Options <ul style="list-style-type: none"> ▪ Term of CRAT (max: 20) ○ Life Options <ul style="list-style-type: none"> ▪ Number of Lives ▪ Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> • Date of Birth ▪ Second Life Age (if two selected) • Payout Rate • Trust Value 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Grantor Age and DOB Information • Second Life Age and DOB Information • Life Expectancy (per IRS Table) • Grantor Year of Death • Actual Life Expectancy • Mortality Table (Select Table) • Annual Growth Rate • Income Tax Rate 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Adjusting Time Value of Money <ul style="list-style-type: none"> ○ Time Value of Money (illustration rate)

Charitable Remainder Unitrust (CRUT) & Net Income with Makeup CRUT (NIMCRUT)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Highest Available § 7520 Rate • Term or Life Selection <ul style="list-style-type: none"> ○ Term <ul style="list-style-type: none"> ▪ Term of CRUT (max: 20) ○ Life <ul style="list-style-type: none"> ▪ Number of Lives ▪ Grantor Age (Nearest Birthday) <ul style="list-style-type: none"> • Grantor Date of Birth • Check Box to Maximize Payout Rate • Payout Rate <ul style="list-style-type: none"> ○ Use when not selecting to maximize • Payout Schedule • Number of Months before First Payment • Trust Value 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Grantor Age and DOB Information • Life Expectancy (per IRS Table) • Grantor Year of Death • Actual Life Expectancy • Mortality Table (select Table) • Annual Growth Rate • Income Tax Rate • Check Box to use FLIP NIMCRUT <ul style="list-style-type: none"> ○ NIMCRUT Number of Deferral Years ○ Percent of Payment Deferred ○ Check Box to use Explosive Asset <ul style="list-style-type: none"> ▪ Years Until Sale ▪ Value On Sale 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Change Remainder Factor Calculation Method <ul style="list-style-type: none"> ○ Change Remainder Factor Calculation Method (Exact or Interpolation) • Adjusting Time Value of Money <ul style="list-style-type: none"> ○ Time Value of Money (illustration rate) • <i>Coming Soon</i> - more NIMCRUT flexibility.

Life Estate / Remainder Interest		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • § 7520 Rate • Number of Lives (one or two) • Age (Nearest Birthday) <ul style="list-style-type: none"> ○ Date of Birth • 2nd Life Age (If two lives selected) 	<ul style="list-style-type: none"> • All <i>Standard</i> Options • Transfer Date • Life Expectancy (per IRS Table) • Illustrated Age of Death • Number of Years (illustrated) • Value of Asset • Annual Growth Rate • Mortality Table (select Table) 	<ul style="list-style-type: none"> • All <i>Standard</i> and <i>Pro</i> Options • Adjusting Time Value of Money <ul style="list-style-type: none"> ○ Time Value of Money (Defaults to the § 7520 rate) • Adjusting Estate Tax Rate (Default: 40%) <ul style="list-style-type: none"> ○ Estate Tax Rate (%)

Amortization		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Choose Variable to Solve <ul style="list-style-type: none"> ○ Payment Amount; Number of Payments; Principal Amount; Interest Rate • Principal Amount • Interest Rate • Payment Frequency • Number of Monthly Payments • Payment Amount • Date of Loan 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> features available 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> or <i>Pro Plus</i> features available

Life Expectancy		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Number of Lives (one or two) • Person 1 Age • Person 2 Age (if selected) • Mortality Table (selection) 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> features available 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> or <i>Pro Plus</i> features available

Holding / Investment Company Valuation		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> • Name of Entity • Gross Value of Entity • Debt Owed By Entity • Interest Percent Transferred • Check Box for Voting Interest • Check Box for Segregated <ul style="list-style-type: none"> ○ Cash % Of Assets ○ Discount On Cash ○ Securities % Of Assets ○ Discount On Securities ○ Bonds % Of Assets ○ Discount On Bonds ○ Real Estate % Of Assets ○ Discount On Real Estate • Lack of Control Discount (if not segregated) • Lack Of Marketability Discount • Tax Affecting Discount 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> features available 	<ul style="list-style-type: none"> • All <i>Standard</i> Options <ul style="list-style-type: none"> ○ No Additional <i>Pro</i> or <i>Pro Plus</i> features available

Valuation Discount (Active Business)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> Name of Entity Annual EBITDA Multiple Of EBITDA Value Of Excess Assets Debt Owed By Entity Percentage Transferred Check Box for Voting Interest Lack Of Control Discount Lack Of Marketability Discount Tax Affecting Discount Coming Soon - Key Dependence Discount 	<ul style="list-style-type: none"> All <i>Standard</i> Options <ul style="list-style-type: none"> No Additional <i>Pro</i> features available 	<ul style="list-style-type: none"> All <i>Standard</i> Options <ul style="list-style-type: none"> No Additional <i>Pro</i> or <i>Pro Plus</i> features available

Required Minimum Distribution (RMD)		
Standard	Pro	Pro Plus
<ul style="list-style-type: none"> This advanced calculator is only available under <i>Pro</i> and <i>Pro Plus</i> plans. 	<ul style="list-style-type: none"> Grantor Age <ul style="list-style-type: none"> Grantor Date of Birth Life Expectancy (per IRS Table) Year of Death Number of Years (illustrated) Annual Growth Rate Income Tax Rate Current Value 	<ul style="list-style-type: none"> Deferral <ul style="list-style-type: none"> Check box to defer first year RMD Charitable Donations <ul style="list-style-type: none"> Max Annual Charitable Donation (Will not exceed RMD amount) QCD Inflation / Chained CPI Rate Check Box to allow charitable to exceed RMD amount Age to Start Charitable Donations

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