

SOFTWARE PRODUCTS TO MAKE ESTATE PLANNERS BETTER PLANNERS, MORE EFFICIENT AND MORE PROFITABLE



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Go to estateview.link to follow along during this presentation



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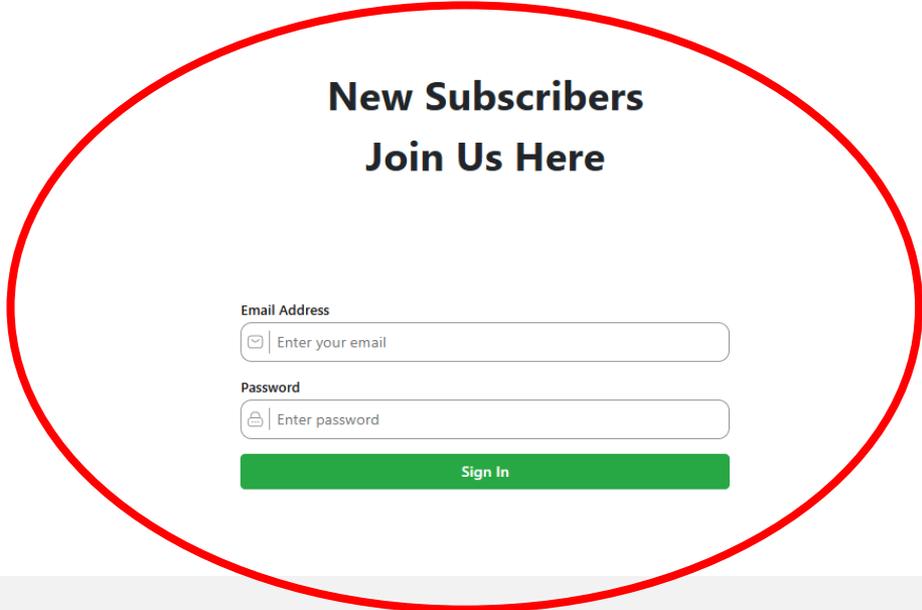


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Subscribe to EstateView Pro-Plus

\$499.00 per
year



EstateView Pro-Plus

\$499.00

All operations with automatic letters, PowerPoints, and advanced settings.

Billed annually

Subtotal

\$499.00

Add promotion code

Total due today

\$499.00

10 - Day FREE Trial

To get started, simply follow these steps:

1. Open your browser and go to estateview.link.
2. Create an account.
3. Select Pro Plus.
4. Enter code **"SHENKMAN"**
4. Fill in your information.
5. Enjoy exploring EstateView!

To access our EstateView Video Library, which has instructional videos for each calculator, [click here](#).



EstateView 30 Minute Workshop

Mon, Feb 17, 2025 12:00 PM - 12:30 PM EST
 Show in My Time Zone

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

1/2 Florida & New York CLE Credit & 1/2 Florida CPE Credit available



*Required field

First Name* Last Name*

Email Address*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

EstateView 50 Minute Workshop

Fri, Mar 14, 2025 12:00 PM - 12:50 PM EDT
 Show in My Time Zone

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

1.0 Florida & New York CLE Credit & 1.0 Florida CPE Credit available



*Required field

First Name* Last Name*

Email Address*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

EstateView Workshop

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

Florida & New York CLE Credit & Florida CPE Credit available for courses in red

**30 minutes
(no credit)**

**30 minutes
(CE credit)**

**50 minutes
(CE credit)**

Tuesday, March 11
12:00 PM EST

Wednesday, March 10
12:00 PM EST

Friday, March 14
12:00 PM EST

Thursday, March 13
12:00 PM EST

Wednesday, March 12
12:00 PM EST

For a **limited time**, you can purchase EstateView at a special discounted rate and lock in your savings for the next three years.

Subscription Cost (Volume Discounts Available)	\$795/year
Comprehensive Plans: Married and Single Client Modules	Full Access (*included with Pro Plus & Pro Elite only)
Amortization Calculator	YES
Life Expectancy Calculator	YES
Holding Company Valuation Calculator	YES
Valuation Discount Calculator	YES
Create side-by-side Plan Comparisons for Each Calculator	YES
Access to stand-alone SCIN/Conventional Calculator	YES
Large Gift / SLAT Calculator	YES
SCIN / Conventional Note Calculator	YES
Installment Sale with Income Tax Analysis Calculator	YES
QPRT Calculator	YES
Private Annuity Calculator	YES
GRAT Calculator	YES

\$499/Year

This exclusive offer expires in 30 days!



CLAT Calculator	YES
CRAT Calculator	YES
CRUT Calculator	YES
Life Estate/Remainder Interest Calculator	YES
Rolling GRAT Calculator	YES*
Access to our Exploding Asset Planning Feature	YES*
Comprehensive Plans: Access to Installment Sale to Grantor Trust / SCIN	YES
Comprehensive Plans: Married and Single Client Letters	YES*
Send e-copies of plans to clients & colleagues (with a free 14-day trial)	YES
Generate Personalized Client PowerPoints	YES
Income Tax Impacts of QPRTs	YES*
Rolling GRAT Calculator	YES*
Flip NIMCRUT Calculator	YES*
4 Hours of Tax Lawyer Time	NO
30 Hours of Customized Video Editing Time	NO
Special Access to Video Editors for \$35 an Hour	NO

SHENKMAN WEBINAR SPECIAL

For a **limited time**, you can purchase EstateView at a special discounted rate and lock in your savings for the next three years.

\$499/Year

This exclusive offer expires in 30 days!



See us at
estateview.info

[Click here to see our EstateView Video Library](#)

ESTATEVIEW VIDEO LIBRARY

Comprehensive Plans	Calculators		My Account
Single Client	Large Gift/SLAT	CLAT	Help
Married Clients	SCIN/Conventional	CRAT	Detailed Instruction Manual
Sample Plan	Installment Sale with Income Tax Analysis	CRUT & NIMCRUT	
NEST Retirement Calculator	QPRT	Life Estate / Remainder Interest	
RMD Calculator	Private Annuity	Amortization	
Monte Carlo	GRAT	Life Expectancy	
Life Insurance Estimator	Rolling GRATs	Holding Company Valuation	
§7520 & AFR Table	Letter Writer (Under Construction)	Valuation Discount (Active Business)	





COMPREHENSIVE PLANS



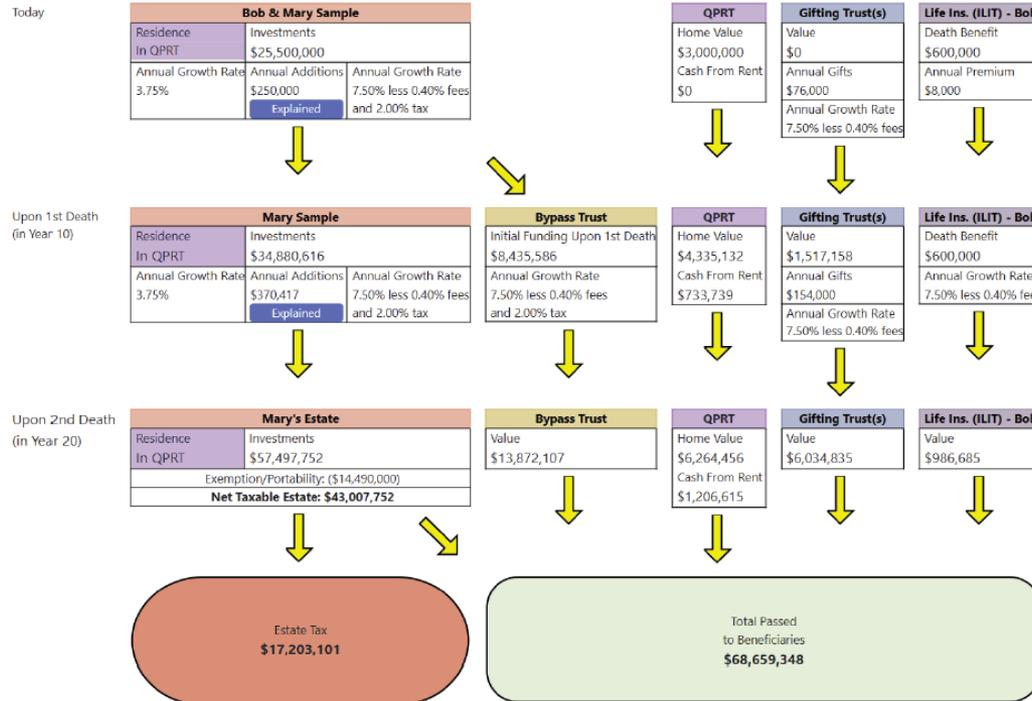
Whether selecting for a **single client** or a **married couple**, EstateView runs the same comprehensive plans, but with applicable option differences:

Single Client

Married Clients

- No Planning (Current Estate)
- No Planning (Future Impact)
- Bypass Trust
- QPRT(s) - Either one or two
- Annual Gifting
- Discounted Gifting
- Life Insurance Trust Planning
- Gift and Installment Sale
- Testamentary Charity

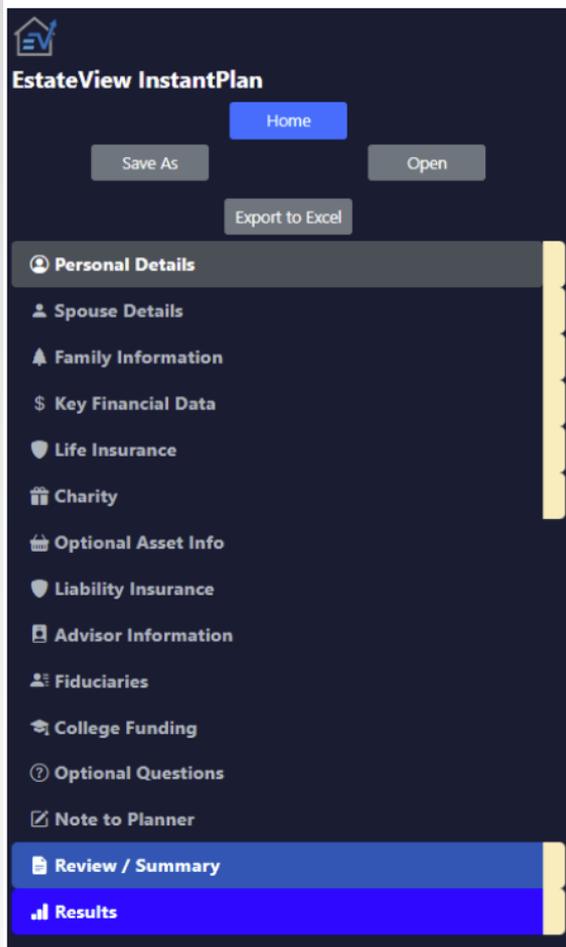
LIFE INSURANCE TRUST PLANNING (20 YEARS)



NEW ADDITIONS

InstantPlan and Client Intake Portal

In Late Stage Working Beta



A brand-new intake system that enables clients to quickly and efficiently provide you with key information, and prompts your team on issues to discuss.

The InstantPlan system allows you to take key client information and instantly populate multiple calculators and generate first draft comprehensive estate tax plans at the click of a button.

The Instant Plan button on the main EstateView screen takes you to the module, which has easy to enter formatting and does not require all information to be inputted in order to receive the calculations and illustrations.

The calculators only need the information boxes that are yellow filled to create a robust presentation. Other information can be inputted and will be printed in a convenient form for future use.

Once the information is entered, the planner can click on [Review/Summary](#) to view a summary for possible changes, and on Results to see the results of multiple calculations and illustrations.

After looking at these any item or items can be changed and then the Reports can be rerun almost instantly.



NEW ADDITIONS

EstateView AI

In Beta



Use our AI-powered features to review, summarize, and enhance trust documents with ease—saving you countless hours and helping you deliver even more value to your clients.

Insert a word or PDF trust document and get AI help that is not available anywhere else.

The screenshot displays the EstateView AI interface. At the top, there's a navigation bar with buttons for 'Scenario Wizard', 'Clause Generator', 'Analysis Tools', and 'Adjust Speed / Detail'. Below this is a secondary bar with 'View Document', 'Clear Analysis', 'Print Discussion', 'Redline Feature', and 'Download Edited Document'. The main content area is split into two columns. The left column, titled 'Upload your trust document to begin analysis', features a file upload section with a 'Choose File' button, a text field showing 'No file chosen', and a note that supported formats are PDF, DOCX, and TXT. A 'Try a Sample Document' button is also present. Below the upload section is a 'Data Security & Confidentiality' notice. The right column, titled 'Analysis Tools', contains a list of analysis options: 'Executive Summary (Part One)', 'Executive Summary (Part Two)', 'Client Summary', 'Issue Spotter', 'Tax Analysis', 'Compliance Check', and 'Drafting Suggestions'. Below this list is a section for 'Basic Trust Information' and other categories, each with a dropdown arrow. A 'Select Analyses to Run' dialog box is overlaid on the bottom left, listing the same analysis tools with checkboxes. The 'Run Selected Analyses' button at the bottom of this dialog is circled in red.

EstateView AI
Your AI-Powered Trust Document Expert

Scenario Wizard | Clause Generator | Analysis Tools | Adjust Speed / Detail

View Document | Clear Analysis | Print Discussion | Redline Feature | Download Edited Document

Upload your trust document to begin analysis

Upload Trust Document

Choose File | No file chosen

Supported: PDF, DOCX, TXT
- or -

Try a Sample Document

Analysis Tools

- Executive Summary (Part One)
- Executive Summary (Part Two)
- Client Summary
- Issue Spotter
- Tax Analysis
- Compliance Check
- Drafting Suggestions

- or click any of the below questions -

- Basic Trust Information
- Beneficiary Identification and Spousal Benefits
- Distribution Provisions and Powers
- Trustee and Fiduciary Provisions
- Special Provisions

Data Security & Confidentiality:
We understand the sensitivity of your trust documents. To ensure their security and privacy:
- All communications and analysis occurs over a secure, encrypted network.
- Your documents are never stored on our servers, but are only stored temporarily in your browser.
- Session data is not stored on our servers.
- No log files are kept.
- Leaving the application will clear all data.

Select Analyses to Run
Choose which reports to run automatically.

- Executive Summary (Part One)
- Executive Summary (Part Two)
- Client Summary
- Issue Spotter
- Tax Analysis
- Compliance Check
- Drafting Recommendations

Run Selected Analyses



ESTATEVIEW CALCULATORS

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.

The screenshot displays the EstateView software interface. At the top center is the logo for EstateView, which includes a stylized house icon with an 'EV' inside, followed by the text 'EstateView' and 'Estate planning software' below it. Below the logo is a grid of blue buttons. The grid is organized into three main columns. The first column on the left contains buttons for 'Comprehensive Plans', 'Instant Plan (Demo Under Construction)', 'Single Client', 'Married Clients', 'Sample Plan', 'NEST Retirement Calculator', 'RMD Calculator', 'Monte Carlo', 'Life Insurance Estimator', and '\$ 7520 & AFR Table'. The middle column is titled 'Calculators' and contains buttons for 'Large Gift / SLAT', 'SCIN/Conventional', 'Installment Sale with Income Tax Analysis', 'QPRT', 'Private Annuity', 'GRAT', 'Rolling GRATs', and 'Letter Writer (Under Construction)'. The third column on the right is titled 'My Account' and contains buttons for 'Help', 'Getting Started Guide', 'Detailed Instruction Manual', 'Manage Billing', and 'Logout'. The 'Instant Plan (Demo Under Construction)' and 'Letter Writer (Under Construction)' buttons are marked with yellow lightning bolt icons.





CALCULATORS



The NEST (**N**eeds/**E**stimated **S**avings **T**abulation) Retirement Calculator helps a client to understand how much they will have for retirement under the present scenario, or what changes are required to meet their retirement goals. The forecaster also shows how much life insurance death benefit coverage may be needed each year to replace the income of a primary earner.

NEST Retirement Calculator

RMD Calculator

The **RMD** (**R**equired **M**inimum **D**istribution) calculator helps users determine the minimum amount that must be withdrawn from retirement accounts, such as IRAs and 401(k)s, based on the account holder's age and account balance. It takes into account IRS life expectancy tables and adjusts for beneficiaries, ensuring that clients stay compliant with tax regulations while optimizing retirement planning.

Named after the **Monte Carlo** Casino, a Monte Carlo Simulation similarly relies on the random sampling of historical market data to give an "edge" to the user in predicting performance - in this case, how well a portfolio may perform based on its diversification, as a percentage, between bonds and equities.

Monte Carlo

Life Insurance Estimator

This calculator produces an estimated cost, per million dollars of death benefit, of life insurance to be used in the initial planning stages. As many life insurance policies require medical screening, it would not be appropriate to assume that this calculator will accurately determine the actual cost that one might incur based on their specific situation.

When planning involves the use of Installment Notes, the planner will need to incorporate the Applicable Federal Rate (AFR) in determining the appropriate interest rate for a transaction that is not at "arm's length". The § 7520 rate is used to value certain annuities and non-charitable interests (life interest, remainder interest, reversionary interest) related to charitable trust planning. This Table shows the monthly rates for each of the § 7520 rate and the AFR, to simplify the planning process for the planner.

§ 7520 & AFR Table





CALCULATORS



Large Gift / SLAT

Large Gift / SLAT Planning considers the tax implications of making "large" gifts to beneficiaries during life. This includes gifts that exceed the Annual Gift Tax Exclusion amount (\$18,000 per person, per recipient, for 2024). This also includes considering that the Code implements a Unified Exemption system for gift and estate tax (\$13.61 million per person for 2024). Lifetime gifts that exceed the annual amount will count against the exemption amount available to mitigate estate tax on death.

SCIN (Self-Cancelling Installment Note), is a special kind of Promissory Note that cancels on death, thus eliminating estate tax on the note amount when properly structured. In exchange for having the note cancel on death, the borrower must pay a higher interest rate or a higher principal amount. The increased interest or principal is determined based upon life expectancy and the Applicable Federal Rate in effect at the time the Note is created.

SCIN/Conventional

Installment Sale with Income Tax Analysis

An **Installment Sale** is a sale for which the party receives (at least one) payment after the tax year in which the transfer occurred. Installment Sales are one method of controlling taxable income on the sale of property, spreading out the tax liability over time.

A **QPRT (Qualified Personal Residence Trust)** is a type of irrevocable trust that allows a Grantor to make a gift (at a discounted gift tax rate) of all or part of their personal residence to the Trust.

QPRT

Private Annuity

A **Private Annuity** is an agreement entered into by an estate taxable person and family members (or a trust or trusts), whereby the estate taxable person transfers assets to the family member (or trust or trusts) in exchange for the right to receive a series of payments for life.





CALCULATORS



A GRAT (**G**rantor **R**etained **A**nnuity **T**rust) is a type of irrevocable trust that is sometimes used to help minimize gift tax exposure on large gifts to family members. The Grantor establishes the Trust for a term of years and receives annual payments from the Trust. The payment amounts are preset by the terms of the Trust Agreement.

GRAT

Rolling GRATs

Rolling GRAT (Grantor Retained Annuity Trust)
select term of years, rates of return, and the 7420 rate for each year to see how this strategy can work.

Letter Writer
Check multiple boxes and allow EstateView to give you a first draft letter that covers a good many important considerations.

 **Letter Writer (Under Construction)** 

CLAT

A CLAT (**C**haritable **L**ead **A**nnuity **T**rust) is a type of irrevocable Charitable Gifting Trust that has a charity as the "Lead" beneficiary that receives payments, in money or assets, at least annually, for a term of years. This charity can be a public charity, a donor-advised fund, or an operating or non-operating family foundation.

A CRAT (**C**haritable **R**emainder **A**nnuity **T**rust) is a type of irrevocable Charitable Gifting Trust where, unlike a CLAT, the non-charity beneficiaries receive annual (or more frequent) payments that are fixed in value (each payment is the same amount) during the Trust term.

CRAT

CRUT & NIMCRUT

A CRUT (**C**haritable **R**emainder **U**nitrust) is the second main category within Charitable Remainder Trusts. With a CRUT, the non-charity beneficiaries receive an annual (or more frequent) payment. This payment is based on a percentage of the Trust value, which can range from 5% to 50%. Like a CRAT, the charity beneficiary receives the remaining assets, at the end of the Trust term.





CALCULATORS



A **Life Estate** is an interest in property, typically real estate, that the Life Tenant has the use of for life.

Life Estate / Remainder Interest

Amortization

Amortization is the process of paying off debt, as a function of principal and interest payments, over time. An Amortization Schedule is created using the applicable inputs, assuming timely and accurate payments that are equal in amount and paid in full, over a specified number of payments.

Life expectancy is a crucial element to estate planning. In all of the previous calculators, failing to correctly assess life expectancy can result in a reduction or loss of tax benefit and/or failure of the intended estate planning method.

Life Expectancy

Holding Company Valuation

Holding Company Valuation

Plug in the variables and associated discount percentages to provide a calculation of value for a holding entity.

Valuation Discount (Active Business)

Plug in the variables and associated discount percentage to provide a calculation of value for an Active Business.

Valuation Discount (Active Business)



PRICING

PRO Plus

\$795/yr for all features

Bulk User Discounts Available

WHY CHOOSE ESTATEVIEW?

- Only EstateView allows you to enter primary client information once, to have instant results.
- **Our calculators stand out because they offer:**
 - Comparisons, client customization, and customized PowerPoints.
 - Comprehensive planning strategies for individuals or married couples.
 - InstantPlan functionality for automating financial data input, reducing manual entry, and streamlining scenario planning.
 - Robust inputs and detailed spreadsheets for financial analysis.
- **With InstantPlan:**
 - Primary client data populates over 7 calculators automatically, and provides multiple pages of instant printable results.
 - Fine-tuning is easier because client specific data is preloaded.
 - Reduces the need for repetitive data entry across multiple tools.
- **Beta Functions Include:**
 - An intake portal for clients to input data, visualize family trees, estimate college costs, and track life events.
 - AI-assisted document analysis and editing.
 - Try our new AI portal (In BETA) as of February 2025 - and very useful.
- Draft customized provisions.
- Input any document letter or other item.
- Receive a client friendly explanation and a more sophisticated advisor explanation.
- receive the results of a 22 point review of common errors and choices for a revocable and irrevocable trust.
- Receive a tax review summary with suggestions.
- Receive a practical planning summary with suggestions.
- Ask our AI to make changes to a document and see a redline appear before your eyes.
- Save the document in word and in a redline PDF for your convenience.
- We use ChatGPT 4.0 in an appropriately enveloped security setting.
- SOC2 level audit certified.





EstateView InstantPlan

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Charity

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Clear All Input Data (Full Form)





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Replace All Inputs with Sample Data (Full Form)

Clear All Input Data (Full Form)

Personal Details - Calculators only require yellow fields information.

Please provide your personal information.

Referred By

Liam Carter

First Name *

Bob

Middle Name

Daniel

Last Name *

Sample

Nickname?

Bobby

Primary Residence City

Clearwater

Primary Residence State

FL | Florida

E-Mail

bob@gmail.com

Phone Number

(727) 123-4567

Occupation(s) / Passion(s)

Lawyer

Social Security Number (last 4 digits) (optional)

1234

Gender

Male

Female

Age

70

Specify Date of Birth?

Life Expectancy: 15.4 years (to age 85)

Joint Life Expectancy with Mary: 22.2 years

Lifetime Gift Exemption Used

- \$0

Marital Status

Please indicate your marital status.

Married?

Previous Marriages/Alimony?



Alan Gassman, JD, LL.M. (Taxation)
agassman@gassmanpa.com



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Replace All Inputs with Sample Data (Full Form)

Clear All Input Data (Full Form)

Spouse Details - Calculators only require yellow fields information.

Please provide your spouse's information.

First Name *

Mary

Middle Name

Jones

Last Name *

Sample

Nickname?

Primary Residence City

Clearwater

Primary Residence State

FL | Florida

E-Mail

mary@gmail.com

Phone Number

(727) 721-1239

Occupation(s) / Passion(s)

Artist

Social Security Number (last 4 digits) (optional)

0000

Date of Birth

01/07/1960

Specify Date of Birth?

Life Expectancy: 19.1 years (to age 84)

Gender

Male
 Female

Lifetime Gift Exemption Used

- \$0 +

Marital Details

When did you get married to Bob?

01/07/1985

Exact Marriage Date

Prenuptial Agreement?

When was the agreement signed?

01/07/1986

Previous Marriages/Alimony?

Mary's previous marriages go here.





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Spouse Details

Family Information

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Replace All Inputs with Sample Data (Full Form)

Clear All Input Data (Full Form)

Family Information - Calculators only require yellow fields information.

Please provide your family details.

Children

Child 1

First Name *

Rachel

Middle Name

Lynn

Last Name *

Thompson

Nickname?

Rach

Primary Residence City

Tampa

Primary Residence State

FL | Florida

E-Mail

rachel@aol.com

Phone Number

(813) 123-5812

Do you want to specify a date of birth?

Date of Birth

01/07/1986

Relationship:

Common child of Bob and Mary

Gender

Male

Female

Life Expectancy: 41.4 years (to age 80)

Turns 18 on January 7, 2004

Marital Status

Is Rachel married?

Married?

Spouse's Name

Jay Thompson

+ Health & Other Info

Any physical/mental health info or other information to discuss?

Health / Other Info?





\$ Key Financial Data - Calculators only require yellow fields information.

Please provide your financial details.

Current Net Annual Savings/(Spending)

Bob's Savings

Current Annual Savings/(Spending)

- \$250,000 +

Age Annual Savings/(Spending) Will Change

- 70 +

Annual Savings/(Spending) After Change

- \$100,000

Age Annual Savings/(Spending) Will Change Again

- 80 +

Annual Savings/(Spending) After Second Change

- (\$100,000)

Mary's Savings

Below numbers only apply after death of Bob.

Current Annual Savings/(Spending)

- \$250,000 +

Age Annual Savings/(Spending) Will Change

- 70 +

Annual Savings/(Spending) After Change

- \$100,000

Age Annual Savings/(Spending) Will Change Again

- 80 +

Annual Savings/(Spending) After Second Change

- (\$100,000)

Residence(s)

Primary Residence

Primary Residence Address

123 Nice St

Primary Residence City

Orlando

Primary Residence State

FL | Florida

Primary Residence ZIP Code

32817

Unit/Apt/Suite

Enter unit, apartment, or suite (optional)

Current Value of Primary Residence

- \$3,750,000

Annual Growth Rate of Primary Residence (%)

- 3.75% +

Ownership

Jointly owned by Bob and Mary



Insurances

Please provide information about your life insurance policies.

Bob's Life Insurance

Life Expectancy: 15.4 years (to age 85)

Joint Life Expectancy with Mary: 22.2 years

Available Policy Estimates

Type	Term	Risk Class	Annual Premium (Per \$1,000,000 Death Benefit)	Action	Status
Term	10 years	Standard	\$15,768.00	Add Policy	
Term	10 years	Preferred	\$10,512.00	Add Policy	
Term	20 years	Standard	\$29,706.00	Add Policy	
Term	20 years	Preferred	\$21,300.00	Add Policy	
Permanent	Life	Standard	\$46,219.00	Add Policy	
Permanent	Life	Preferred	\$42,441.00	Add Policy	

See added policies below in yellow.

EstateView InstantP

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Existing Policies [Add Existing Policy](#) Latest: Policy #1 added

Scroll down to see added existing policies in blue.

Life Policy 1 (Bob)

Policy Type

Term

In Trust?

No

Annual Premium

- \$8,000 +

Number of Years

12

Initial Death Benefit

- \$600,000 +

Beneficiaries

Current Beneficiary

Enter current beneficiary...

Contingent Beneficiary

Enter contingent beneficiary...

Carrier Info

Policy Carrier

Enter carrier...

Policy Account Number (last 4 digits) (optional)

Enter carrier account number...

Remove Policy

Alan Gassman, JD, LL.M. (Taxation)
agassman@gassmanpa.com



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Clear All Input Data (Full Form)

Charity

Please provide your charity preferences.

Would you consider a charitable donation or structure?

- Yes
- No

Charitable Structure Type

Choose One:

- Direct Charitable**
- Charitable Lead Annuity Trust (CLAT)
- Charitable Remainder Trust (CRT)

Charities

Charity 1

Charity 1

Donation Amount

- \$ Dollar**
- % Percentage
- ? Unknown Amount

5000

Charity 2

Charity 2

Donation Amount

- \$ Dollar
- % Percentage**
- ? Unknown Amount

5

Charity 3

Charity 3

Donation Amount

- \$ Dollar
- % Percentage
- ? Unknown Amount**



Alan Gassman, JD, LL.M. (Taxation)
agassman@gassmanpa.com



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Estate planning software

Software Products to Make Estate Planners Better
Planners, More Efficient and More Profitable |



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Replace All Inputs with Sample Data (Full Form)

Clear All Input Data (Full Form)

Optional Asset Info - Nothing on this page exports into calculators.

Please provide information about your assets.

Personal-Use Real Estate

Real Estate Property 1

Address

123 Nice St

State

FL | Florida

Unit/Apt/Suite

Enter unit, apartment, or suite...

City

Orlando

ZIP Code

32817

Current Value of Property

\$3,750,000

Who owns the property?

Bob (Bobby)

Mary

Rachel (Rach)

Emily (Emmy)

Mark (Marcus)

Jane

Joe

Elizabeth

Other Owner Name...

Do you have homeowner's insurance?

Asset Destination on Owner's Death

Choose One:

Sell

Gift

Donate / CLAT

Undecided

\$ Mortgages

Mortgage Amount Owed

\$100,000

Would you like to enter more details?

Mortgage Monthly Payment

\$2,500

Mortgage End Date

January 2025

Mortgage Interest Rate

5.00%

Remove Mortgage





Save As

Personal Details

Spouse Details

Family Information

Key Financial Data

Insurances

Charity

Optional Asset Info

Advisor Information

Fiduciaries

College Fu

Optional C

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Advisor/Contact Information - Nothing on this page exports into calculators.

Please provide your advisor or contact information.

CPA/Accountant

CPA Name

Sarah Daniels

CPA Email

sarah.daniels@financify.com

CPA Phone

(555) 123-4567

May we speak to your CPA/Accountant directly?

Investment Advisors

Investment Advisor 1

Name

David Thompson

Email

david.thompson@wealthwise.com

Phone

(555) 567-8901

Specify what this advisor handles?

Info

Stocks

May we speak to your advisor directly?

Pension Plan Advisors

Pension Plan Advisor 1

Name

Morty Smith

Email

mortysmith@gmail.com

Phone

(512) 213-5194

May we speak to your advisor directly?

Add Advisor

Life Insurance Agents

Life Insurance Agent 1

Life Insurance Agent 1 Name

Emma Hart

Life Insurance Agent 1 Email

emma.hart@lifecure.com

Life Insurance Agent 1 Phone

(555) 901-2345

Specify what this agent handles?

May we speak to your agent directly?



Personal Details

Spouse Details

Family Information

Key Financial Data

Insurances

Charity

Optional Asset Info

Advisor Information

Fiduciaries

College Funding

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Replace All Inputs with Sample Data (Full Form)

Clear All Input Data (Full Form)

Fiduciaries - Nothing on this page exports into calculators.

Please provide information about your fiduciaries for various roles.

Personal Representatives

Bob (Bobby)'s Personal Representatives

Can Bob's personal representatives work jointly?

Yes

Personal Representative, Choice #1

Agent Name

Michael Angelo

Use Spouse

Agent Email

michaelangelo@gmail.com

Agent Phone Number

(212) 123-4567

Remove

Personal Representative, Choice #2

Agent Name

Leo Nardo

Use Spouse

Agent Email

leonardo@gmail.com

Agent Phone Number

(212) 651-2023

Remove

Add Personal Representative



College Funding

Please provide information regarding college funding for all children under 18.

Michael Sample (Age: 16)

Relationship: Common child of Bob and Mary

How much have you saved for Michael?

\$ 10000

Estimated College Costs

⚠ College costs only include tuition. Does not include books, housing, food, transportation, etc.

Undergraduate Degree Type

N/A \$0	Public (In-State) \$42,107.04 for 4 Years	Public (Out-of-State) \$105,267.60 for 4 Years	Private \$210,535.20 for 4 Years
------------	--	---	-------------------------------------

Graduate School Type

Will Michael be attending graduate school?

Projected Tuition Cost: \$0.00

Suggested Full Funding:

\$0

Year	Age	Beginning Value	Growth	Expenses	Ending Value
2027	18	\$10,000.00	\$700.00	\$0.00	\$10,700.00
2028	19	\$10,700.00	\$749.00	\$0.00	\$11,449.00
2029	20	\$11,449.00	\$801.43	\$0.00	\$12,250.43
2030	21	\$12,250.43	\$857.53	\$0.00	\$13,107.96

Do you have a college savings plan for Michael Sample?

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Clear All Input Data (Full Form)

Optional Questions

Answering these questions will help build your plan:

1) Do you know how much cash would be needed to settle your estates and trusts and pay estate taxes?

Yes No I don't know

2) Will banks or other lenders call loans in the event of your death?

Yes No I don't know

3) Are you confident that there is enough life insurance or other assets cordoned off for the exclusive use of your beneficiaries in a way that creditors cannot reach them?

Yes No I don't know

4) Do you know how much cash your beneficiaries need each month for the first 24 months after your death?

Yes No I don't know

5) Will there be adequate cash and cash flow?

Yes No I don't know

6) Have you factored in income taxes and other expenses that may occur upon death?

Yes No I don't know

7) If updates are recommended to your IRA beneficiary designations, would you like our assistance with this?

Yes No I don't know

8) If updates are recommended to your pension plan beneficiary designations, would you like our assistance with this?

Yes No I don't know

9) If updates are recommended to your life insurance ownership and/or beneficiary designations, would you like our assistance with this?

Yes No I don't know





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Note to Planner

Provide any additional notes or information for your planner.

Your Message

This is a note to the planner.





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Clear All Input Data (Full Form)

Review Your Information

Please review your information before submitting.

Personal Information

Spouse 1

Referred by: Liam Carter

Name: Bob Daniel Sample (Bobby)

City: Clearwater

Date of Birth: 01/07/1955

Age: 70

Email: bob@gmail.com

Occupation(s) / Passion(s): Lawyer

Gender: Male

Health Info: Bob's health issues go here.

Doctor Name: Dr. Health

Is Smoker: Yes

State: FL

Father's Name: John Jean Sample (Johnny)

Mother's Name: Jane Jones Sample

Phone Number: (727) 123-4567

SSN (last 4 digits): 1234

Lifetime Gift Exemption Used: \$0

Doctor Phone Number: (813) 321-5938

Spouse 2

Name: Mary Jones Sample

City: Clearwater

Date of Birth: 01/07/1960

Age: 65

Email: bob@gmail.com

Occupation(s) / Passion(s): Artist

Gender: Female

Marriage Date: 01/07/1985

Previous Marriages/Alimony: Mary's previous marriages go here.

Health Issues: Mary's health issues go here

Doctor Name: Dr. Health

Is Smoker: No

State: FL

Father's Name: Joe Jan Nedd

Mother's Name: Elizabeth Smith Nedd

Phone Number: (727) 721-1239

SSN (last 4 digits): 0000

Lifetime Gift Exemption Used: \$0

Preuptial Date: 01/07/1986

Doctor Phone Number: (813) 321-5938





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CLIENT INFORMATION

Results

Here are the calculated results and your information summary.

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SCIN Results

Private An

Client Information

Client Details

Name: Bob Daniel Sample (Bobby)

Age: 70

Life Expectancy: 15.4 years

Life Insurance Estimates for Bob

Term Life Insurance Premiums:

Term	Risk Class	Premium
10 years	Standard	\$15,768.00
10 years	Preferred	\$10,512.00
20 years	Standard	\$29,706.00
20 years	Preferred	\$21,300.00
25 years	Standard	Probably not available
25 years	Preferred	Probably not available
30 years	Standard	Probably not available
30 years	Preferred	Probably not available

Permanent Life Insurance Premiums:

Risk Class	Premium
Standard	\$46,219.00
Preferred	\$42,441.00

Spouse Details

Name: Mary Sample

Age: 65

Life Expectancy: 19.1 years

Life Insurance Estimates for Mary

Term Life Insurance Premiums:



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FAMILY TREE

CONTACTS

Results

Here are the calculated results and your information summary.

Save to Calculators

Client Information | Family Tree | Contacts | RMD Results | Monte

Family Tree

Bob's Parents:

- Father: John Sample (Male)
- Mother: Jane Sample (Female)

Mary Sample's Parents:

- Father: Joe Nedd (Male)
- Mother: Elizabeth Nedd (Female)

Bob (Bobby) (Age 70 , Male) and **Mary Sample** (Age 65 , Female)

- **Common Children:**
 - Rachel Thompson (Age 39 , Female)
Common child of Bob and Mary
 - Michael Sample (Age 16 , Male)
Common child of Bob and Mary
- **Common Grandchildren:**
 - Emily Grey (Age 20)
 - Jimmy Grey (Age 16)
- **Other Family Members:**
 - Mark
Mary's Nephew/Niece

Results

Here are the calculated results and your information summary.

Save to Calculators

Client Information | Family Tree | Contacts | RMD Results

Contacts

CPA Information

Name: Sarah Daniels

Email: sarah.daniels@financify.com

Phone: (555) 123-4567

Investment Advisors

Name: David Thompson

Email: david.thompson@wealthwise.com

Phone: (555) 567-8901

Life Insurance Agents

Name: Emma Hart

Email: emma.hart@lifesecond.com

Phone: (555) 901-2345

Emergency Contacts

Name: Mark Sample

Relationship: Brother

Phone: (555) 456-7890

Name: Jessica White

Relationship: Close Friend

Phone: (555) 678-9012



Results

Here are the calculated results and your information summary.

RMD

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RMD Projections

RMD Results for Bob

Inputs Used:

Current Age	70
Life Expectancy	15.4
IRA Current Value	\$3,750,000
Annual Growth Rate	7.50%

Summary:

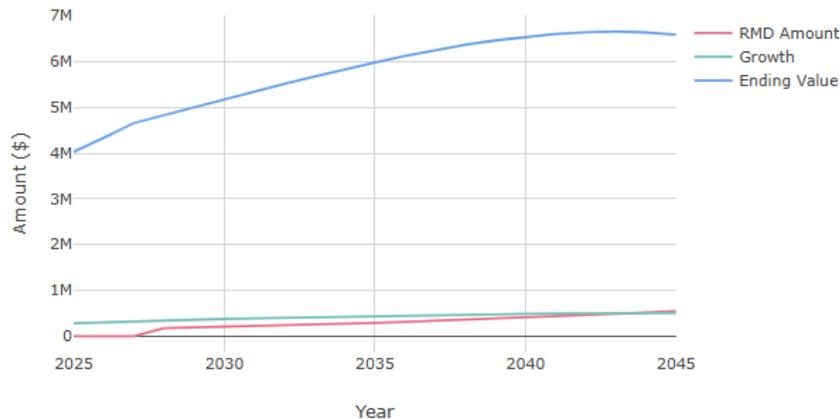
Current Value	Number of Years Illustrated	RMD Starting Age	First Year RMD	First Year RMD Amount	Illustrated End Value
\$3,750,000	21	73	2028	\$175,797	\$6,593,721

Detailed Projections: (dashed line for life expectancy)

Year	Age	Beginning Value	Growth	RMD	Ending Value
2025	70	\$3,750,000	\$281,250	\$0	\$4,031,250
2026	71	\$4,031,250	\$302,344		
2027	72	\$4,333,594	\$325,020		
2028	73	\$4,658,613	\$349,396		
2029	74	\$4,832,213	\$362,416		
2030	75	\$5,005,130	\$375,385		
2031	76	\$5,177,054	\$388,279		
2032	77	\$5,346,892	\$401,017		
2033	78	\$5,514,420	\$413,582		
2034	79	\$5,677,346	\$425,801		
2035	80	\$5,834,079	\$437,556		
2036	81	\$5,982,819	\$448,711		
2037	82	\$6,123,138	\$459,235		
2038	83	\$6,251,392	\$468,854		
2039	84	\$6,367,061	\$477,530		
2040	85	\$6,465,599	\$484,920		
2041	86	\$6,546,419	\$490,981		
2042	87	\$6,606,715	\$495,504		
2043	88	\$6,643,419	\$498,256		
2044	89	\$6,656,754	\$499,257		
2045	90	\$6,639,983	\$497,999	\$544,261	\$6,593,721

Visualization:

RMD Performance Over Time for Bob



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Here are the calculated results and your information summary.

Save to Calculators

Client Information Family Tree Contacts RMD Results **Monte Carlo Results** NEST Results QPRT Results

Monte Carlo Analysis

Bob's IRA Monte Carlo Analysis

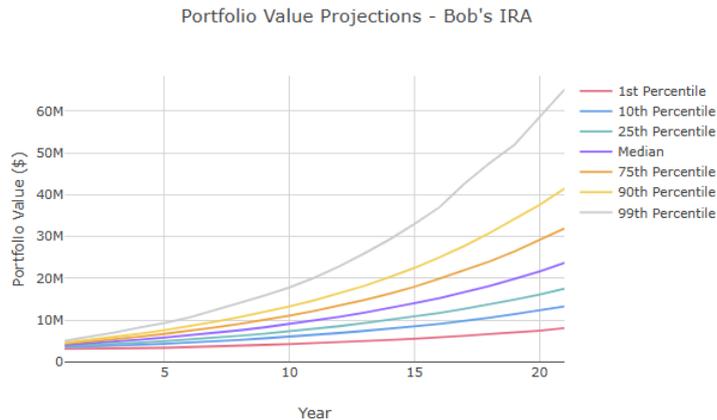
Analysis Parameters:

Initial Portfolio Value	\$3,750,000
Bond Allocation	33.33%
Stock Allocation	66.67%
Years Projected	21

Results Summary (Average Annual Growth Rate):

1st Percentile	10th Percentile	25th Percentile	50th Percentile	75th Percentile	90th Percentile	99th Percentile
3.77%	6.22%	7.62%	9.18%	10.74%	12.12%	14.56%

Portfolio Value Timeline



Return Percentages Timeline

Portfolio Return Percentages - Bob's IRA



ASSET ALLOCATION SUMMARY (2025)



Personal
Belongings

0.79%

\$100,000



Home

11.81%

\$1,500,000



Vacation
Home

7.09%

\$900,000



Spouse 1
IRAs

4.88%

\$620,000



Spouse 2
IRAs

6.30%

\$800,000



Investments

6.14%

\$780,000



Operating
Businesses

23.62%

\$3,000,000



Investment
Real Estate

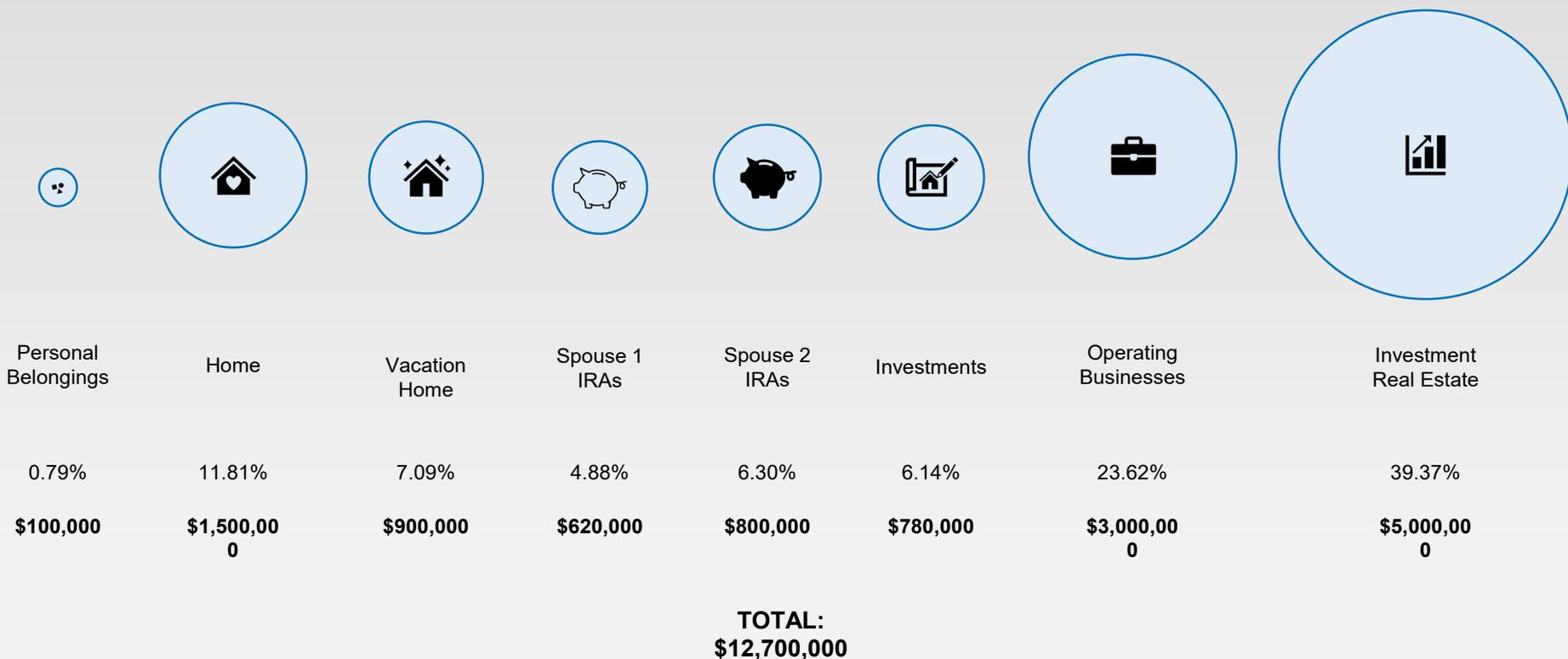
39.37%

\$5,000,000

TOTAL:
\$12,700,000



ASSET ALLOCATION SUMMARY (2045)



Results

Here are the calculated results and your information summary.

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Needs/Estimated Savings Tabulation (NEST) Projections

The NEST calculator helps determine if your current financial trajectory aligns with your retirement goals and estate planning objectives.

When to Use NEST:

- **Retirement Planning:** To determine if your current savings and investment strategy will meet your retirement income needs.
- **Estate Planning:** To ensure your estate goals can be met while maintaining your desired lifestyle in retirement.

NEST Results Analysis:

- **Amount Needed At Retirement:** The amount of investments needed at the desired retirement age to meet all income and desired estate at death goals after considering all future additions, expenses, growth, and debt.
- **Illustrated Amount At Retirement:** The amount projected at the desired retirement age based on your inputs.
- **Year of Retirement Savings Surplus/Deficit:** The difference of the illustrated amount at retirement and the amount needed at retirement.
- **Year One Annual Savings Surplus/Deficit:** The difference of the current year one annual savings and the annual savings required to meet all goals.
- **Year One Additional Investment Required:** The difference of the current year one investments amount and the year one investments amount needed to meet all goals.
- **Actual Required Retirement Age:** The actual retirement age that will meet all goals with the current inputs.
- **Required Retirement Income:** The actual retirement income amount required to meet all goals with the current inputs.

NEST Analysis - Combined

Inputs Used:

Age	70
Spouse Age	65
Retirement Age	75
Current Investments	\$28,000,000
Personal Homes Value	\$8,750,000
Annual Return Before Retirement	7.50%
Annual Return After Retirement	6.00%
Desired Retirement Income	\$175,000
Desired Estate At Death	\$1,500,000

Summary:

Amount Needed At Retirement	Illustrated Amount At Retirement	Retirement Savings Surplus/Deficit
(\$5,742,653)	\$43,105,087	\$48,847,741



QPRT

Results

Here are the calculated results and your information summary.

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Qualified Personal Residence Trust (QPRT) Projections

A Qualified Personal Residence Trust (QPRT) allows you to transfer your primary or secondary residence to beneficiaries while retaining the right to live in the property for a specified term. This strategy can help reduce estate and gift taxes by freezing the value of the residence for gift tax purposes.

When to Use QPRT:

- **Reducing Estate Size:** QPRTs are effective when you want to remove the value of your residence from your taxable estate, potentially lowering estate taxes.
- **Retained Use:** Ideal if you plan to continue living in the residence for a number of years.
- **IRS § 7520 Rate:** This is an IRS-determined interest rate that affects the valuation of the retained use. A **higher** 7520 rate is better for QPRTs because a higher 7520 rate increases the present value of the retained interest (the right to live in the home without paying rent). Since the value of the retained interest is higher, the taxable gift is lower because the retained interest is subtracted from the overall home value to calculate the gift.

QPRT Results Analysis:

- **Term of QPRT:** The number of years you retain the right to live in the property. Longer terms result in smaller gift values but increase the risk of the property reverting back to your estate if you do not survive the QPRT term.
- **Value of Home:** The current market value of the property being transferred into the QPRT.
- **Probability of Surviving Term:** The likelihood that you will outlive the QPRT term, affecting whether the remaining property value passes to the beneficiaries.
- **Gift Percentage:** The portion of the property's value considered a gift for tax purposes.
- **Amount of Gift:** The monetary value of the gift based on the gift percentage and the property's value.

QPRT Projection - Bob's Primary Residence (Assume Bob contributes 50% Ownership)

Inputs Used:

Grantor's Age	70
Term of QPRT	7
Property Interest %	50%
Value of Home	\$1,875,000
Annual Growth Rate	3.75%

Summary:

Term of QPRT	Ownership Percentage	Value of Home	Probability of Surviving Term	Gift Percentage	Amount of Gift	Value to Beneficiaries at End of Term
7	50%	\$1,875,000	83.09%	58.27%	\$1,092,529	\$2,426,152

Detailed Projections:

Year	Age	Beginning Value	Growth	Ending Value	Estate Tax Savings (Per 1 Million)
2026	71	\$1,875,000	\$70,313	\$1,945,313	\$0.00
2027	72	\$1,945,313	\$72,949	\$2,018,262	\$0.00
2028	73	\$2,018,262	\$75,685	\$2,093,947	\$0.00
2029	74	\$2,093,947	\$78,523	\$2,172,470	\$0.00
2030	75	\$2,172,470	\$81,468	\$2,253,937	\$0.00



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Results

Here are the calculated results and your information summary.

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Self-Canceling Installment Note (SCIN) Projections

A Self-Canceling Installment Note (SCIN) is an estate planning tool that allows you to transfer assets to family members with a mechanism that cancels the outstanding note balance upon the Payee's death. This strategy can help transfer wealth while potentially reducing estate and gift taxes.

When to Use SCIN:

- **Wealth Transfer:** Ideal for transferring substantial assets to beneficiaries while retaining control over repayment terms.
- **Tax Efficiency:** SCINs can reduce the size of your taxable estate and utilize gift tax exemptions effectively.

SCIN Results Analysis:

- **§ 7520 Rate:** An IRS-determined interest rate used to calculate the present value of future payments. It influences the valuation of the note.
- **AFR (Applicable Federal Rate):** Determines the minimum interest rate for an installment note.
- **Interest Rate Risk Premium:** This premium is added to the standard interest rate to compensate for the increased risk of the note's self-canceling provision. It is a reflection of the additional cost associated with the payee's mortality risk.
- **Term of Note:** The duration over which payments are expected. The longer the SCIN note, the higher the interest rate premium will be, but the greater the possibility of payee dying and the note cancelling before completing repayment.
- **Note Amount:** This is the amount of debt obligation that the borrower agrees to pay back.
- **Annual Payment:** The yearly interest-only payment amount that the borrower must make to the payee.

* This projection assumes a 30% valuation discount.

Bob's SCIN

Inputs Used:

Age	70
§ 7520 Rate	5.20%
AFR	4.11%
Term of Note (years)	15
Asset Value	\$1,000,000
Valuation Discount Rate	30%
Note Amount	\$700,000
Seed Gift	\$100,000
Seed Gift Valuation Discount Rate	30%
Seed Gift Value	\$70,000
Interest Rate Risk Premium	4.7627%
Interest Rate With Premium	8.8727%
Annual Payment	\$62,109



PRIVATE ANNUITY

Results

Here are the calculated results and your information summary.

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Private Annuity Projections

A Private Annuity allows you to transfer assets to a beneficiary in exchange for a lifetime annuity payment. This strategy can help remove assets from your taxable estate while providing you with a steady income stream.

When to Use a Private Annuity:

- **Estate Reduction:** Ideal for reducing the value of your taxable estate, potentially lowering estate taxes.
- **Income Stream:** Provides the annuitant with a lifetime income stream while transferring assets to beneficiaries.

Private Annuity Results Analysis:

- **Annuity Payments:** The periodic payments you receive in exchange for the transferred assets.
- **Remainder Value:** The projected value that passes to the beneficiaries at the end of the annuity term.
- **Estate Tax Savings:** The potential reduction in estate taxes due to the transfer.

* This projection assumes a 30% valuation discount.

Private Annuity Projection - Bob

Inputs Used:

Grantor's Age	70
Asset Value Transferred	\$1,000,000
Valuation Discount Rate	30%
Discounted Asset Value	\$700,000
Annual Growth Rate	7.50%
\$ 7520 Rate	5.20%

Summary:

Annuity Amount	Years Illustrated	Remainder Value	Exhaustion Test Requirement (Additional Amount Required)
\$71,936	21	\$1,145,711	\$1,191,810 (Requirement) - \$1,000,000 (Initial Sale) = \$191,810 (Additional amount required)



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GRAT

Results

Here are the calculated results and your information summary.

Save to Calculators

Client Information Family Tree Contacts RMD Results Monte Carlo Results NEST Results QPRT Results SCIN Results Private Annuity Results **GRAT Results** Married Comprehensive Alternatives Letter Writer Optional Questions

Grantor Retained Annuity Trust (GRAT) Projections

A Grantor Retained Annuity Trust (GRAT) is a type of irrevocable trust used to transfer wealth to beneficiaries with reduced tax consequences. The trust's creator (grantor) contributes assets and receives fixed annuity payments for a set number of years. After the term, any remaining assets in the trust pass to the beneficiaries tax-free.

When to Use GRAT:

- **IRS § 7520 Rate:** This is an IRS-determined interest rate that affects the valuation of the annuity. A **lower** 7520 rate is better for GRATs because the IRS assumes that the trust assets will grow at that rate. If the assets grow faster, the excess growth passes to the beneficiaries tax-free.
- **High Growth Assets:** GRATs work best when funded with assets that are expected to grow faster than the 7520 rate. If the asset appreciates rapidly, the remaining value after the annuity payments is larger.

GRAT Results Analysis:

- **Annuity Payments:** These are fixed payments the grantor receives annually. In higher terms (years), annuity payments are usually smaller, but they will be received for a longer time and the Grantor is less likely to survive the term.
- **Growth:** If the asset grows faster than the 7520 rate, the excess growth passes to the beneficiaries tax-free. This is why higher-growth assets tend to perform better in a GRAT.
- **Ending Balance:** This is the amount left in the trust after all annuity payments are made. If the grantor survives the GRAT term, the remaining balance goes to the beneficiaries.

GRAT Projection - Term: 2 Years

Inputs Used:

Grantor's Age	70
Trust Value (Initial Contribution)	\$1,000,000
Annual Growth Rate	7.50%
IRS §7520 Rate	5.20%

Summary:

Initial Contribution	Term (Years)	Annuity Amount	Remainder Value to Beneficiaries	Probability Grantor Survives Term
\$1,000,000	2	\$539,316	\$36,544	95.95%

Detailed Projections:

Year	Beginning Balance	Annuity Payment	Growth	Ending Balance	Estate Tax Savings (Per 1 Million)
2026	\$1,000,000	\$539,316	\$75,000	\$535,684	\$0
2027	\$535,684	\$539,316	\$40,176	\$36,544	\$14,608



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MARRIED COMPREHENSIVE

Results

Here are the calculated results and your information summary.

Save to Calculators

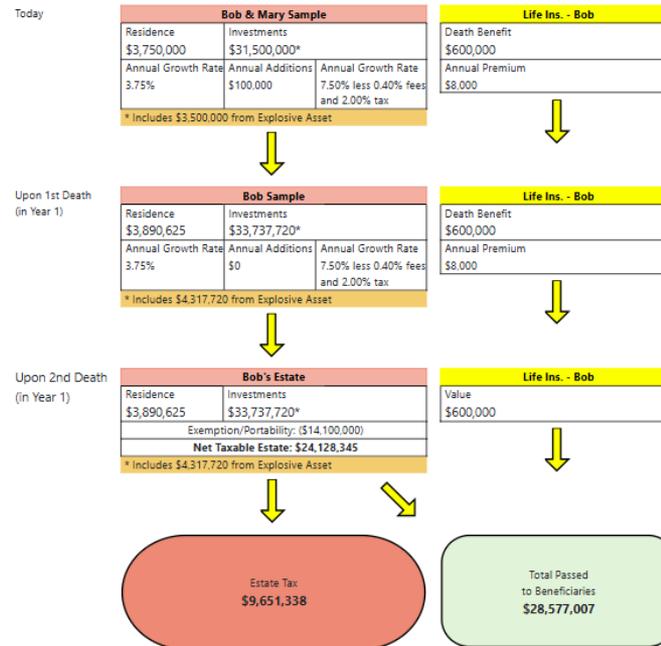
Client Information Family Tree Contacts RMD Results Monte Carlo Results NEST Results QPRT Results

Comprehensive Planning

Generate Client Letter

BOTH DIE THIS YEAR - NO PLANNING

BOTH DIE THIS YEAR - NO PLANNING



ALTERNATIVES

Results

Here are the calculated results and your information summary.

Save to Calculators

Client Information Family Tree Contacts RMD Results Monte Carlo Results NEST Results QPRT Results SCIN Results Private Annuity Results GRAT Results **Married Comprehensive** Alternatives Letter Writer O

\$1,000,000 PROMISSORY NOTE/SCIN/PRIVATE ANNUITY/GRAT ALTERNATIVES

DECEMBER 2024 / CLIENT AGE 70

Alternatives: (For December 2024 allowable Applicable Federal Rates and December 2024 Section 7520 Rate of 5.0%)

CLIENT
(AGE 70)

<3 Year Interest Only Installment Note @ 3.96%	Payment = \$39,600 per year*
9 Year Interest Only Installment Note @ 3.67%	Payment = \$36,700 per year*
>9 Year Interest Only Installment Note @ 4.06%	Payment = \$40,600 per year*
15 Year Interest Only SCIN @ 8.8727% (w/ 30% discount)	Payment = \$62,109 per year*
Private Annuity Level Annual Payment (w/ 30% discount)	Payment = \$71,935.79 per year
3 Year Level Payment GRAT @ 5.0%	Payment = \$363,082 per year
3 Year GRAT @ 5.0%	Initial Payment = \$300,815 and Increases Annually by 20%**

TRUST
(PURCHASER)

* Notes would have no penalty for prepayment – minimum payments are shown above.

Self-cancelling installment Notes must balloon before life expectancy as measured at time of Note being made. Client's life expectancy is 15.4 years under IRS tables. The SCIN calculations above are based on a 15-year note term.

** This GRAT assumes that each annuity payment will increase by 20% each year. All GRATs assume no taxable gift on funding

If interest rates increase in the future, consider the use of a 20-year interest only note at the 4.06% long-term AFR, locking in a 4.06% rate for the next 20 years.

Note: Lowest allowable semi-annual compounding Applicable Federal Rates for December 2024 are:

- Short-Term – 3.96%
- Mid-Term – 3.67%
- Long-Term – 4.06%

Usable through December 31, 2024 for a "sale or exchange"



Alan Gassman, JD, LL.M. (Taxation)
agassman@gassmanpa.com



Software Products to Make Estate Planners Better
Planners, More Efficient and More Profitable |

Bob and Mary
123 Nice St
Orlando, FL 32817

Dear Bob and Mary:

INTRODUCTION

The purpose of this letter is to provide you with information pertinent to your estate planning. While this letter does not cover every detail or matter we have discussed or will discuss with respect to your planning, it will hopefully be of interest to you regarding the work that we are doing.

We will assume that you will review each letter, email, document, and correspondence that we send to you. If any of these items require further clarification or you have questions, please let us know and we will be happy to follow up.

Although some of the items discussed in this letter may not seem to precisely fit your situation at this time, we advise you to review all the information as it may become important in the future. In particular, having a knowledge of these matters will help you to identify situations that you may want to discuss with us as they arise.

CONFIDENTIALITY AND THE ATTORNEY-CLIENT PRIVILEGE

One advantage that comes with working with a law firm is that communications between us may be kept confidential for purposes of discovery in the event of litigation, Internal Revenue Service (IRS) audits, or in certain other circumstances, under what is known as attorney-client privilege. This confidentiality can extend to all forms of communication, including in-person meetings, phone calls, emails, and written correspondence.

It is important to note that the attorney-client privilege has certain limitations and exceptions that you should be aware of. To qualify under the attorney-client privilege, the communications must be between you and our office, and possibly with individuals or companies who are directly helping you to receive legal services from us. For example, a friend who you bring to a meeting may not be covered under the privilege depending upon their function. If not then their participation in the meeting could render the meeting outside of the attorney-client privilege. Also, any information that you share with others outside our office regarding our representation of you is outside the scope of the attorney-client privilege because it was not made to us in the course of our representation of you. As such, it is advisable that you limit discussion of matters related to our representation of you to as few other parties as possible.



OPTIONAL QUESTIONS

Results

Here are the calculated results and your information summary.

Save to Calculators

[Client Information](#) [Family Tree](#) [Contacts](#) [RMD Results](#) [Monte Carlo Results](#) [NEST Results](#) [QPRT Results](#) [SCIN Results](#) [Private Annuity Results](#) [GRAT Results](#) [Married Comprehensive](#) [Alternatives](#) [Letter Writer](#) [Optional Questions](#)

Optional Questions

- Will banks or other lenders call loans in the event of your death?
 - Yes ▶
- If updates are recommended to your pension plan beneficiary designations, would you like our assistance with this?
 - Yes ▶
- If updates are recommended to your life insurance ownership and/or beneficiary designations, would you like our assistance with this?
 - Yes ▶
- Do you know if you have a power of attorney over your parents?
 - Yes

▶ Discuss with advisor



Upload your trust document to begin analysis



Upload Trust Document

Choose File No file chosen

Supported: PDF, DOCX, TXT

- or -

 Try a Sample Document

Data Security & Confidentiality:

We understand the sensitivity of your trust documents. To ensure their security and privacy:

- All communications and analysis occurs over a secure, encrypted network.
- Your document is processed entirely in-memory; it is never written to disk or stored persistently.
- Session data (memory) automatically expires after 1 hour of inactivity, ensuring no long-term retention of your information.
- No logs of the document's content, queries, or responses are created, and once the session ends, all related data is permanently cleared.
- Leaving this page, closing your browser, inactivity, or clicking the "clear analysis" button, will instantly, permanently, and irreversibly clear all data.

Upload your trust document to begin analysis



Upload Trust Document

Choose File No file chosen

Supported: PDF, DOCX, TXT

- or -

 Try a Sample Document

-  **(DOCX) Husband's Living Trust (with Amendments)**
Sample Trust Document
-  **Husband's Living Trust (with Amendments)**
Sample Trust Document
-  **Inheritance Trust**
Sample Trust Document
-  **Irrevocable Trust**
Sample Trust Document
-  **Life Insurance Trust Agreement**
Sample Trust Document
-  **Married Couple Gifting Trust (with Scrivener Protector)**
Sample Trust Document
-  **Nevada Trust Agreement**
Sample Trust Document
-  **Land Trust**



Select Analyses to Run

Choose which reports to run automatically.

- Executive Summary (Part One)
- Executive Summary (Part Two)
- Client Summary
- Issue Spotter
- Tax Analysis
- Compliance Check
- Drafting Recommendations

Run Selected Analyses



Ready to Analyze

Questions about the trust document or explore our analysis tools, clause generator, and scenario wizard.

Try asking:

Who is the grantor of this trust? Is the trust revocable or irrevocable? What are the key distribution provisions?

2025-01-07 17:29:53
Executive Summary (Part 1)

Processing response...

2025-01-07 17:29:55
Executive Summary (Part 2)

Processing response...

2025-01-07 17:29:57
Client Summary

Processing response...

2025-01-07 17:29:58
Issue Spotter Report

Analysis Tools

Executive Summary (Part One)

Executive Summary (Part Two)

Client Summary

Issue Spotter

Tax Analysis

Compliance Check

Drafting Suggestions

- or click any of the below questions -

Basic Trust Information

Beneficiary Identification and Spousal Benefits

Distribution Provisions and Powers

Trustee and Fiduciary Provisions

Special Provisions

Ask a question...



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1. Open your browser and go to estateview.link.
2. Create an account.
3. Select Pro Plus.
4. Enter code **"SHENKMAN"**
4. Fill in your information.
5. Enjoy exploring EstateView!

To access our EstateView Video Library, which has instructional videos for each calculator, [click here](#).



EstateView 30 Minute Workshop

Mon, Feb 17, 2025 12:00 PM - 12:30 PM EST
 Show in My Time Zone

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

1/2 Florida & New York CLE Credit & 1/2 Florida CPE Credit available



*Required field

First Name* Last Name*

Email Address*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

EstateView 50 Minute Workshop

Fri, Mar 14, 2025 12:00 PM - 12:50 PM EDT
 Show in My Time Zone

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

1.0 Florida & New York CLE Credit & 1.0 Florida CPE Credit available



*Required field

First Name* Last Name*

Email Address*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

EstateView Workshop

In this workshop, we will be walking you through the features and benefits of EstateView to help you measure, design, and illustrate estate planning techniques for your clients.

Florida & New York CLE Credit & Florida CPE Credit available for courses in red

**30 minutes
(no credit)**

**30 minutes
(CE credit)**

**50 minutes
(CE credit)**

Tuesday, March 11
12:00 PM EST

Wednesday, March 10
12:00 PM EST

Friday, March 14
12:00 PM EST

Thursday, March 13
12:00 PM EST

Wednesday, March 12
12:00 PM EST

Subscription Cost (Volume Discounts Available)	\$795/year
Comprehensive Plans: Married and Single Client Modules	Full Access (*included with Pro Plus & Pro Elite only)
Amortization Calculator	YES
Life Expectancy Calculator	YES
Holding Company Valuation Calculator	YES
Valuation Discount Calculator	YES
Create side-by-side Plan Comparisons for Each Calculator	YES
Access to stand-alone SCIN/Conventional Calculator	YES
Large Gift / SLAT Calculator	YES
SCIN / Conventional Note Calculator	YES
Installment Sale with Income Tax Analysis Calculator	YES
QPRT Calculator	YES
Private Annuity Calculator	YES
GRAT Calculator	YES

For a **limited time**, you can purchase EstateView at a special discounted rate and lock in your savings for the next three years.

\$499/Year

This exclusive offer expires in 30 days!



CLAT Calculator	YES
CRAT Calculator	YES
CRUT Calculator	YES
Life Estate/Remainder Interest Calculator	YES
Rolling GRAT Calculator	YES*
Access to our Exploding Asset Planning Feature	YES*
Comprehensive Plans: Access to Installment Sale to Grantor Trust / SCIN	YES
Comprehensive Plans: Married and Single Client Letters	YES*
Send e-copies of plans to clients & colleagues (with a free 14-day trial)	YES
Generate Personalized Client PowerPoints	YES
Income Tax Impacts of QPRTs	YES*
Rolling GRAT Calculator	YES*
Flip NIMCRUT Calculator	YES*
4 Hours of Tax Lawyer Time	NO
30 Hours of Customized Video Editing Time	NO
Special Access to Video Editors for \$35 an Hour	NO

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This exclusive offer expires in 30 days!



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Moderated by:

Martin Shenkman, CPA, J.D.
Shenkman@shenkmanlaw.com

THANK YOU FOR PARTICIPATING!

Presented by:

Alan Gassman, J.D., LL.M.
agassman@gassmanpa.com

