

# ONESOURCE™ 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.

800.331.2533 | [onesource.thomsonreuters.com/estate](http://onesource.thomsonreuters.com/estate)

## ONESOURCE Trust & Estate Administration

### 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			
<b>Personal Information</b>				
First Name	Client	John	Spouse	Jane
Last Name	Client	Doe	Spouse	Doe
Age in Beginning Year *	Client	75	Spouse	74
Year of Death *	Client	2008	Spouse	2015
Beginning Year	2000	First To Die	Last To Die	
<b>General Assets (Non-IRD Assets)</b>				
Amount Held Jointly (with rights of survivorship)	Joint	Client	Spouse	
Amount Passing Directly to Spouse/Client		200,000	0	0
Amount Passing Directly to Heirs		0	0	0
Amount Passing to Will / Revocable Trust		1,000,000	500,000	
TOTAL	200,000	1,000,000	500,000	
<b>Retirement Plans and IRAs (IRD Assets)</b>				
Amount Passing Directly to Spouse/Client	Client	Spouse		
Amount Passing Directly to Heirs		100,000	100,000	
Amount Passing to Will / Revocable Trust		0	0	
TOTAL		100,000	100,000	

