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.

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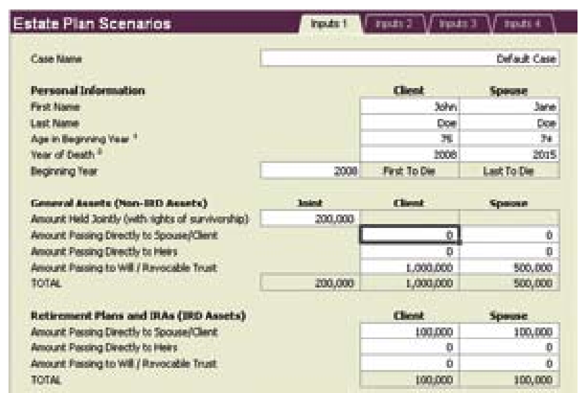
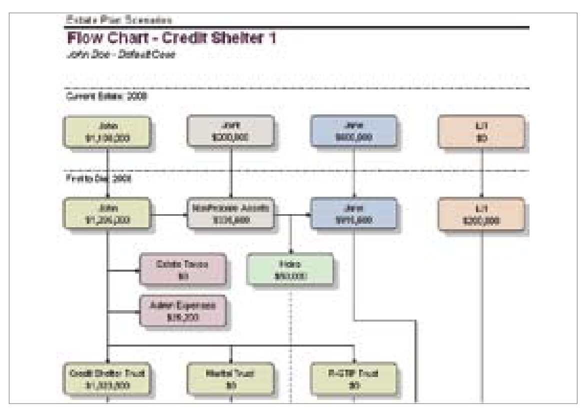
ONESOURCE Trust & Estate Administration

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





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