WealthTec® Suite Financial & Estate Planning Software

WealthTec Suite is a comprehensive wealth planning application for savvy professional advisors serving the high-net worth/ultrahigh-net worth market. No other product available today provides the depth and breadth of financial and estate modeling capabilities as this system. **WealthTec Suite** includes powerful strategic and tactical planning tools that give you the ability to generate and compare planning illustrations under a number of alternative scenarios. Use it to construct family wealth plans that layer basic and advanced estate planning structures into a comprehensive design.

As a leading provider of sophisticated financial and estate planning software tools, **WealthTec** continues to deliver products and services that can help you stand out in a crowded, competitive field. As a **WealthTec Suite** user, you'll join the growing ranks of experienced trust and estate attorneys, CPAs, financial planners, insurance professionals and trust officers practicing in firms large and small who have learned firsthand the power of **WealthTec Suite**, which has been updated for the Tax Cuts & Jobs Act of 2017.

WealthTec Suite can help you communicate your ideas to clients in a compelling manner. It offers flexible data entry, extensive what-if planning capabilities, informative reports and customizable, client-friendly presentations that explain estate and charitable planning concepts to your clients in a language they can understand. For estate planning designs it is simply unrivaled. **WealthTec Suite** offers a level of financial and estate planning flexibility and integrated reporting you've only dreamed about. Most importantly, it will keep you on the cutting edge…where you belong.

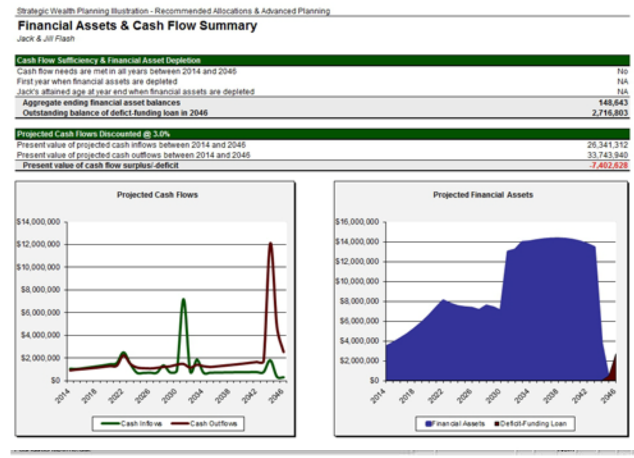
Basic Wealth Planning

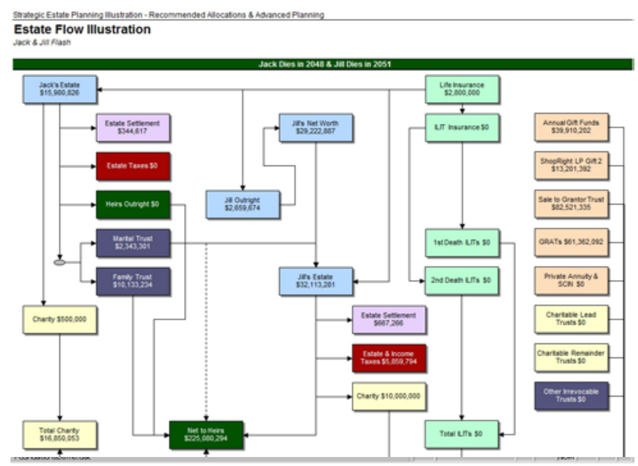
- Integrated balance sheet, cash flows and taxes
- Asset-by-asset dispositive control
- Outright charitable gifts & bequests
- Bypass trusts & QTIPs
- DSUE elections
- Annual exclusion gifts
- Applicable exclusion gifts
- FLP/FLLC family entity
- ILITs
- Valuation discounts
- GST planning

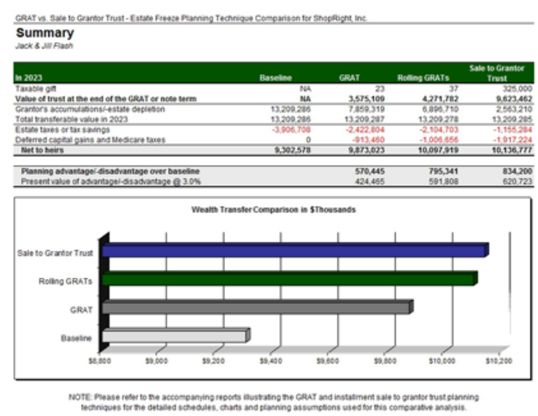
Advanced Estate Planning

- Sale to IDGTs
- Combined IDGT-ILIT
- QPRTs
- GRATs
- Rolling GRATs
- GRATs seeding IDGTs
- Private annuity
- SCIN
- *Inter vivos* CLAT & CLUT
- Zero-out T-CLAT
- CRAT
- CRUT
- NIMCRUT
- Private foundation

The annual **WealthTec Suite** licensing fee for a single user is **$1,595**. Multiuser discounts are also available. We invite you to visit www.wealthtec.com to learn more about our offering.







About the Author

Howard Eisenberg, CPA/PFS, CFP®, CPWA®, CTFA®, CLU®, ChFC®, CASL® is the founding president and creative force behind **WealthTec**. As an experienced financial and estate planner he knows your business well.

Free 45-Day Trial | **www.wealthtec.com** | **(301) 725-1437**