

Wealth Transfer Planning™ Version Comparison Chart

Forms and Planning Options	Standard Version	Pro Version
Wills —essential planning options for less complex, non-taxable estates; includes QTIP Trusts, family trust, descendants separate trusts; planning options for special needs, pre-residuary bequests and decoupling. State specific options and language.	X	X
Wills —advanced options for wealthier clients with taxable estates and advanced planning needs; GST planning, decoupling, special needs planning, more. State specific options and language.	X	X
Revocable Trusts —essential planning options for less complex, non-taxable estates; QTIP Trusts, family &, descendants trusts; special needs; decoupling; joint and single grantor trusts	X	X
Revocable Trusts —advanced options for wealthier clients with taxable estates and advanced planning needs GST planning, decoupling, special needs options and more. State specific acknowledgements, options and language (joint and single grantor trusts)	X	X
Irrevocable Trusts —with or without life insurance — basic and advanced planning techniques including Cascading Crummey Powers, GST tax planning and more	X	X
Extra Crummey TrustSM —a superior annual exclusion vehicle	X	X
Powers of Attorney —state specific forms (durable, health care, living wills, HIPAA authorizations)	X	X
Client Aid Documents —Fee agreements, engagement letters, questionnaires, checklists	X	X
Grantor Retained Annuity Trust — includes options for “Walton,” rolling and parallel GRATS	X	X
Qualified Personal Residence Trust	X	X
Lifetime QTIP Trust —generates “Supercharged Credit Shelter Trust SM —super idea for spouses	X	X
Charitable Planning Trusts —CRTs, CLTs and wholly charitable trusts	X	X
Split Purchase TrustSM —service marked strategy that is superior to a QPRTs, in certain situations	X	X
Minor’s 2503c Trust	X	X
Business Related Agreements —Limited Partnership Agreements, LLC, Buy-Sell	X	X
Strategic Planning Analyses and Memoranda —compendium of 11 strategic planning memos	X	X
Marital Agreements —Separate property agreement, partition agreement, spousal agreement	X	X
Miscellaneous —Certificate of Trust; Private Annuity Trust and more	X	X
Technical & Support	Standard Version	Pro Version
Basic web-based training —Functionality and Formatting Classes	X	X
Basic Technical & Content Support —Live phone and web support for 30 days	X	X
Extended Technical & Content Support —Live phone and web support for 12 months	N/A	X
Legal Discussion Forum & Knowledgebase	X	X
Personal Coaching —90-minute one-on-one coaching session (using web link)	X	X
Customization Tools —functions permitting customizing of language in templates; profiles	X	X
Advanced web-based training —Customization classes	N/A	X
Individual 1+1 License —One License for desktop and second for laptop or home PC (same user)	N/A	X
LISI Services —Free access to Leimberg Information Services (LISI) research tools via web link	N/A	X
TimeMatters® Feature Package Import Feature —third-party feature package, permitting import of	X	X

data from TimeMatters® to InterActive LegalSuite products		
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***TimeMatters® Feature Package is a product of Basha Systems, LLC (www.bashasys.com) and must be purchased separately.**