

# CCH® ViewPlan® Advanced

Create plans and graphs quickly to effectively illustrate estate planning options.

Planning and Presentation Software • Calculation Log • Scenario Menu • State Law Builder • Quick Plan

CCH® ViewPlan® Advanced is a powerful and versatile software package designed for accountants, attorneys and other professionals who focus on estate planning. With fast, easy data input and manipulation, you can quickly generate sophisticated reports and graphs to present a variety of actuarial, charitable and intra-family wealth transfer planning techniques to affluent clients — all in a single planning environment.

## CREATE ESTATE PLAN VISUAL PRESENTATIONS

- Create estate plans and make modifications as you discuss them with clients
- Combine data and graphics in vivid, colorful charts
- Make changes with just one click
- Adjust state estate tax rates
- Customize state tax formulas
- Illustrate benefits and consequences of various planning strategies
- Plan *inter vivos* or testamentary estates
- Add customized disclaimers to point out important information to clients

## CALCULATE AND COMPARE ADVANCED ASSET TRANSFER TECHNIQUES

- Charitable Remainder Annuity Trusts (CRATs)
- Charitable Remainder Unitrusts (CRUTs)
- Pooled Income Funds (PIFs)
- Charitable Lead Annuity Trusts (CLATs)
- Charitable Lead Unitrusts (CLUTs)
- Charitable Gift Annuities
- Grantor Retained Annuity Trusts (GRATs)
- Grantor Retained Unitrusts (GRUTs)
- Qualified Personal Residence Trusts (QPRTs)
- Grantor Retained Income Trusts (GRITs)
- Private Annuity
- Installment Sales
- Self-Canceling Installment Notes (SCINs)

Enter, calculate, analyze, compare, and illustrate all of the most popular actuarial, charitable and intra-family wealth transfer techniques.

## ENHANCE YOUR CREDIBILITY

- Demonstrate planning recommendations to clients
- Present clients with vivid graphical presentations

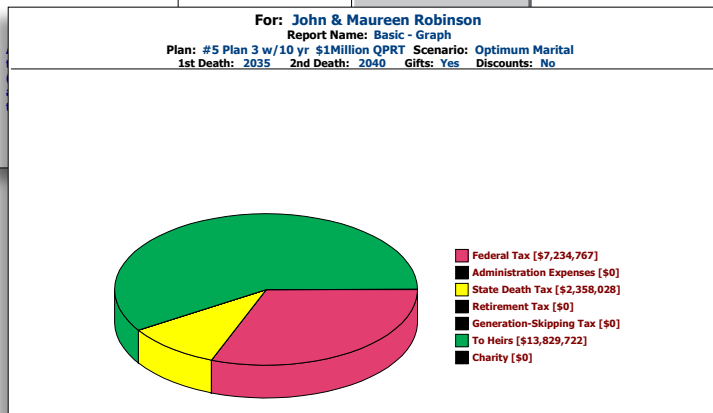
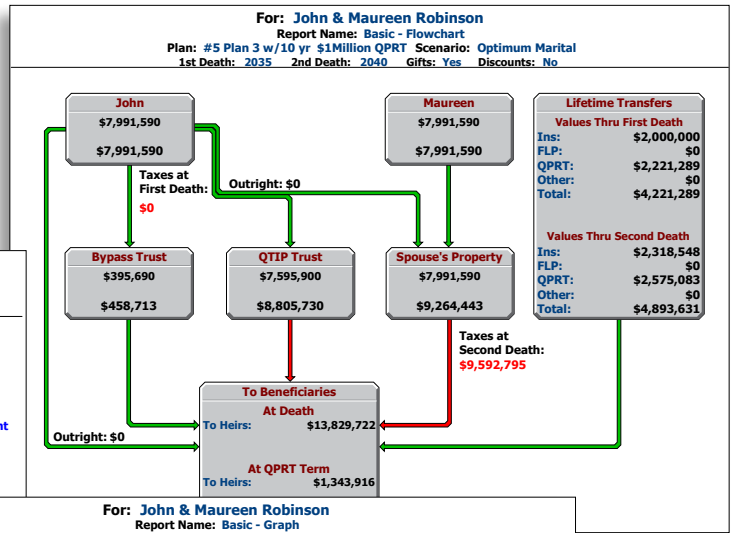
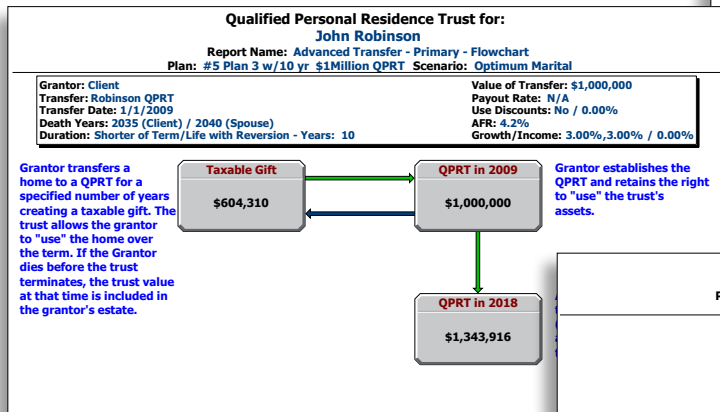
## REDUCE MANUAL ENTRY TIME

- Share information between CCH ViewPlan Advanced and LexisNexis HotDocs
- Export reports to Microsoft® Word documents and PDF files, share with clients

## CUSTOMIZATION AND FLEXIBILITY

- State Law Builder adjusts state estate tax on year-by-year basis
- Calculation Log identifies input errors and creates an audit trail
- Quick Plan easily enters client data
- Scenario Menu quickly creates “what if” changes within a scenario

VIVID GRAPHICS INSTANTLY REINFORCE YOUR RECOMMENDATIONS



To learn more about CCH ViewPlan Advanced, please contact your CCH Account Representative at 1-888-CCH-REPS (1-888-224-7377) or visit CCHGroup.com.

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