



# Brentmark

	Private Planning Tools (Checklist)	Charitable Planning Planner (Checklist)	Private & Charitable Planner LIVE!
1099-Interest and Specific Check Calculation Shown in 10 Areas of Calculation	X		X
Retirement Calculations	X		X
Excess Tax Calculations	X		X
Federal and State Death Tax Calculations (and All States)	X		X
Insurance, Investment, and Real Estate Calculations	X		X
Transfer Taxes, Gifting, Trusts, Marital, and Lifetime Calculations	X		X
General Analysis of Charitable Matters	X		X
CRAT, CRUT, CLUT, GRAT, GRUT, GPPF, and Integrated Estate Tax	X	X	X
Detailed and Complex Analysis of Charitable Matters		X	X
Income Tax Deductions Spread Over Years		X	X
Capital Gains Strategy Modified by Inflationary Challenges		X	X
Fixed Income Funds		X	X
Charitable Remainder in Residential Plans		X	X
Complex Charitable DR Annuity		X	X
CRAT as IRA Beneficiary			X
CRUT as IRA Beneficiary			X
IRA Conversion			X
Roth IRA Payable Life Insurance Premiums			X
IRA Converted to Roth IRA with Insurance Premiums Paid via Distributions Paid from Retirement Accounts/IRA/IRA Rollover			X
Roth CRAT			X
Social Security: Optimize			X
Social Security: Spouse of Qualified Worker			X
Social Security: Family Survival Benefits			X
Social Security: ABLE			X
Social Security: Earnings Test			X