



**BRENTMARK PORTAL
TECHNICAL SUPPORT
Estate Planning Tools (Desktop) v.2020.02**

While Brentmark is happy to announce the latest release of Estate Planning Tools (Desktop) v.2020.02. Some of our customers may have temporarily experienced issues with logging into their Portal or downloading their copy. If you are having a hard time retrieving v. 2020.02, please refer to these helpful hints.

If you have any further questions, please feel free to email Brentmark at support@brentmark.com or call us directly 803.781.9595.

HELPFUL TIPS:

FOR CURRENT CUSTOMERS ATTEMPTING TO LOG IN:

If you received an email directly, you already have an account created for you.

In May 2020, you were sent an email with your username and password.

- Your username is your email address.
- The password can be reset using the "Lost Your Password?" link that is located on the sign in page, **AFTER** you click on the "Client Portal" blue button.
- **Do NOT create a new account.**

ONCE YOU HAVE LOGGED IN:

The landing page you should have visible will be the Portal Dashboard.

1. Locate Estate Planning Tools (Desktop App) on the Portal Dashboard.
2. Locate and select the button labeled "Download".
 - This will download the file "Estate_Planning_Tools_202002.zip" to your browser's download folder.
3. Once the download is complete, select the "Estate_Planning_Tools_202002.zip" file listed in your Downloads folder.
 - This will unzip the file and begin running the installation.

ADDITIONAL INFORMATION:

The Brentmark Client Portal supports most modern browsers. Internet Explorer 11 is currently supported, but it is highly recommended to use Microsoft's Edge in place of Microsoft Internet Explorer 11. Chrome, Firefox, and Safari are also supported.

Brentmark is thrilled to have recently released **Estate & Charitable Planner LIVE**, which is a web-based application that COMBINES ALL of the models from **Charitable Financial Planner** (Desktop) and ALL the models from **Estate Planning Tools** (Desktop). Additionally, there are several models that are centralized around the SECURE Act which are not available in either desktop program. If you are interested in this application, individual and enterprise licensing is available. Feel free to email Brentmark at sales@brentmark.com for an account review.

Desktop applications can only be downloaded and installed on Microsoft Windows Operating Systems (unless you are using a third-party tool such as Parallels for Mac).

Web-based applications, such as **Estate & Charitable Planner LIVE**, work on all platforms, but do require a modern browser.