

## **Yourefolio™ Partners with Brentmark Inc.'s Estate & Charitable Planner LIVE Providing Advanced Planning Calculations**

**Cleveland, Ohio /PRNewswire/** -- Yourefolio™, the leader in estate and legacy planning software, has partnered with Brentmark, Inc. to provide advanced planning calculations through the Yourefolio™ platform. Brentmark, Inc. the leader in advanced planning calculations for estate, retirement, and charitable planning, provides tools for highly accurate calculations, visual reports, and a solid understanding of many tax decisions that High Net Worth clients face when planning for the transfer of their estate.

The single sign on portal connects users seamlessly to Brentmark, Inc. Estate & Charitable Planner LIVE within the Yourefolio™ application. Estate planners creating a plan with their clients can access the calculations and pair those up with Yourefolio's™ Flowwhiz illustration tool. The hard numbers along with stimulating visuals make it easy for clients to understand tax strategies within their estate.

"This partnership solves several challenges planner face with High Net Worth clients", said Scott Huff, CEO of Yourefolio™, "Brentmark's calculations are the most accurate in the industry, it makes perfect sense for our users." Nicole Maholtz, CEO of Brentmark, Inc. explains, "Brentmark has been very focused on progressing our entire product line to more innovative and streamlined technology platforms. We are very excited about this partnership with Yourefolio, in that it brings these goals a step further by allowing our customers to seamlessly access Brentmark products and calculations directly from the Yourefolio platform."

Yourefolio™ and Brentmark, Inc. will co-host a webinar to illustrate the integration on October 8<sup>th</sup>, 2020 at 2pm EST. To join the webinar, register using [https://us02web.zoom.us/webinar/register/WN\\_dZMaN16QPy9v7ZhZsnFgw](https://us02web.zoom.us/webinar/register/WN_dZMaN16QPy9v7ZhZsnFgw).

For more information about Yourefolio™ please visit [www.yourefolio.com](http://www.yourefolio.com) or email [info@yourefolio.com](mailto:info@yourefolio.com).

For additional information on Brentmark, Inc. products and services visit [www.brentmark.com](http://www.brentmark.com) or email [info@brentmark.com](mailto:info@brentmark.com).

### **About Yourefolio™**

Yourefolio™ is the only comprehensive estate and legacy planning platform for estate planning professionals. The platform is specifically designed to facilitate all activities undertaken by estate planners and their practice. Yourefolio provides a 21st century approach to estate planning by bringing everything into one modern-day platform. From engagement and prospecting, analyzing and reviews, illustrations, and administration, to settlement and legacy planning, Yourefolio™ provides every tool for an estate planner to practice more effectively and efficiently. Yourefolio™ is the future of estate and legacy planning.

### **About Brentmark, Inc.**

Brentmark, Inc. has been the industry gold-standard for highly accurate estate, retirement, and charitable planning calculation software for over 35 years. Our corporate philosophy was founded on the principle that good financial and estate planning decisions must be supported by facts and vigorous analysis in order to mitigate risk. Brentmark, Inc.'s primary goal is to help clients improve the quality of their financial, tax, and estate planning services by improving the proficiency and accuracy of often-changing legislative financial calculations.