

**BRENTMARK PORTAL
TECHNICAL SUPPORT**
Estate Planning Tools (Desktop) v.2021.00

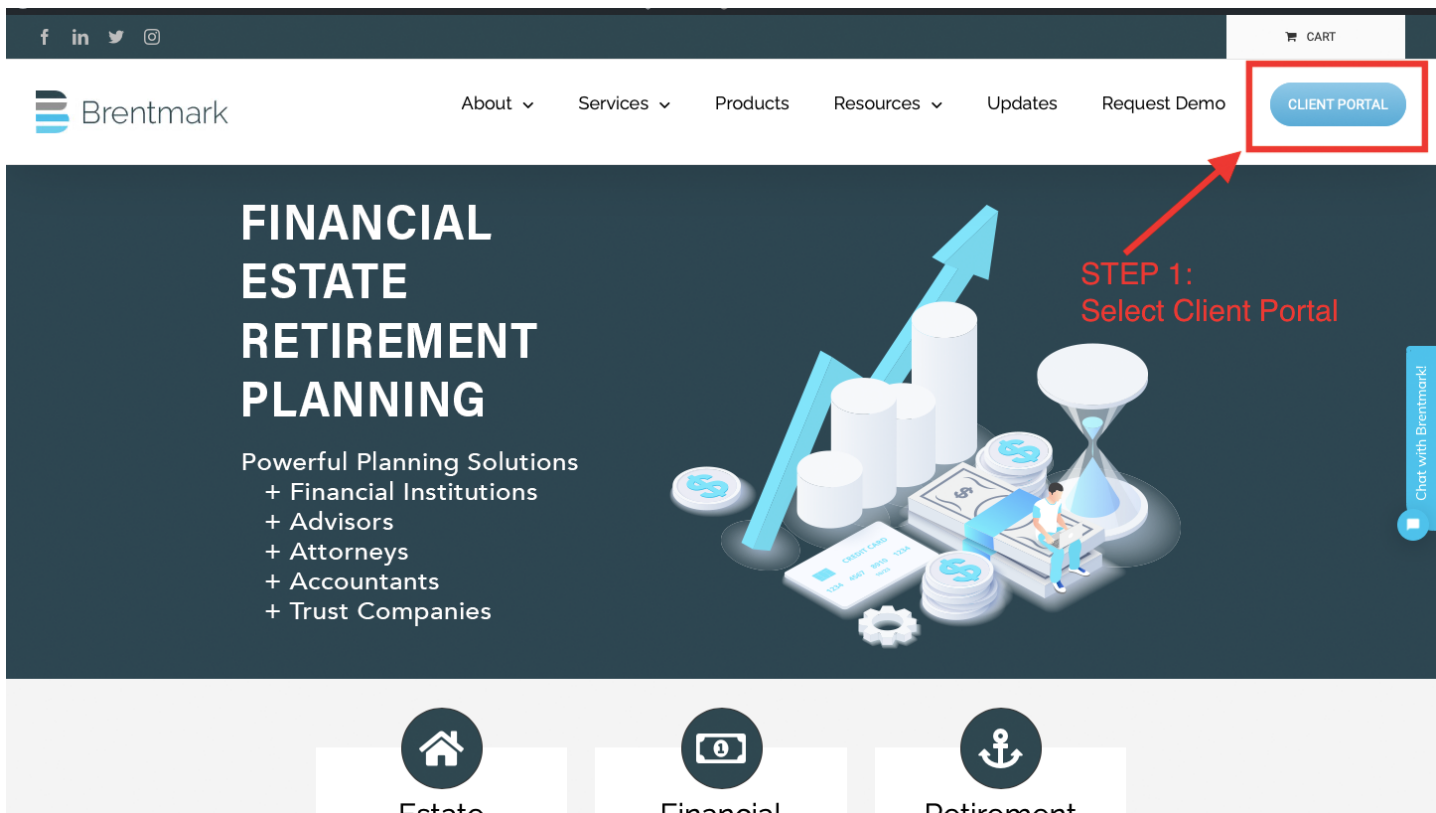
Brentmark, Inc. is happy to announce the latest release of **Estate Planning Tools** (Desktop) v.2021.00. Some of our customers may need a refresher logging into their Portal or downloading their copy. If you are having a hard time retrieving v. 2021.00, please refer to these helpful hints.

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:

1. Using your Internet browser, go to www.brentmark.com
2. Click on the "Client Portal" blue button near the top right of the webpage.



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**FINANCIAL
ESTATE
RETIREMENT
PLANNING**

Powerful Planning Solutions

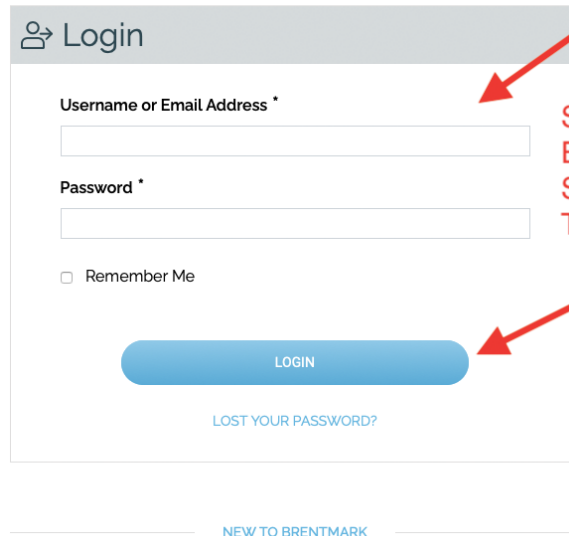
- + Financial Institutions
- + Advisors
- + Attorneys
- + Accountants
- + Trust Companies

STEP 1:
Select Client Portal

Chat with Brentmark!

Estate Financial Retirement

3. Use the login page to enter your information to get to the dashboard.



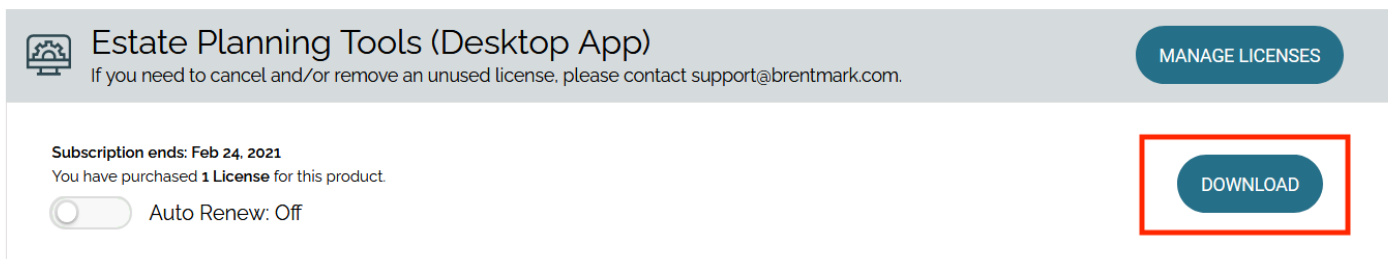
STEP 2:
Enter Your Information And
Select "Login"
To Login To Your Portal Account



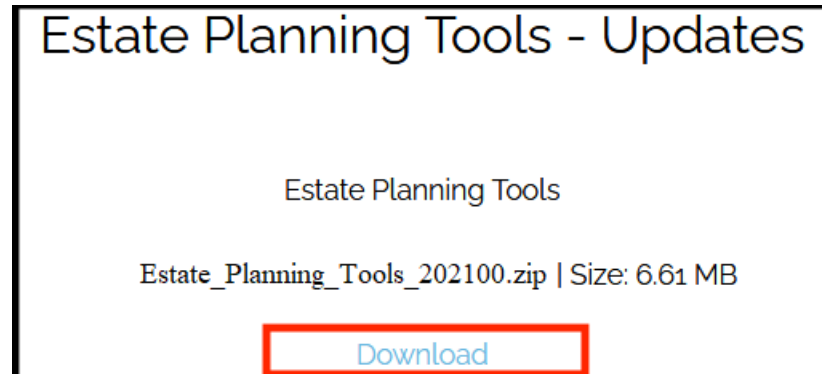
ONCE YOU HAVE LOGGED IN:

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

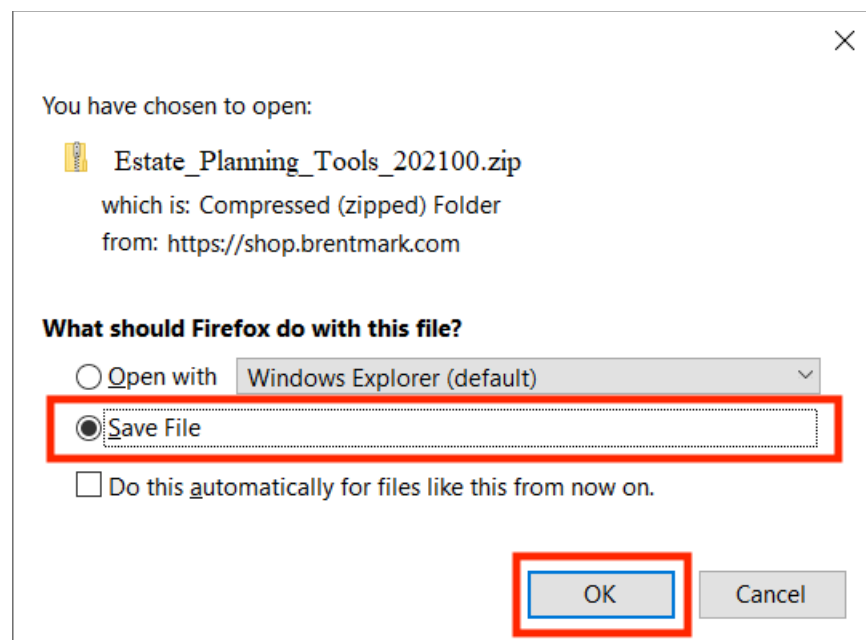
1. Locate Estate Planning Tools (Desktop App) on the Portal Dashboard.
2. Locate and select the button labeled "Download".



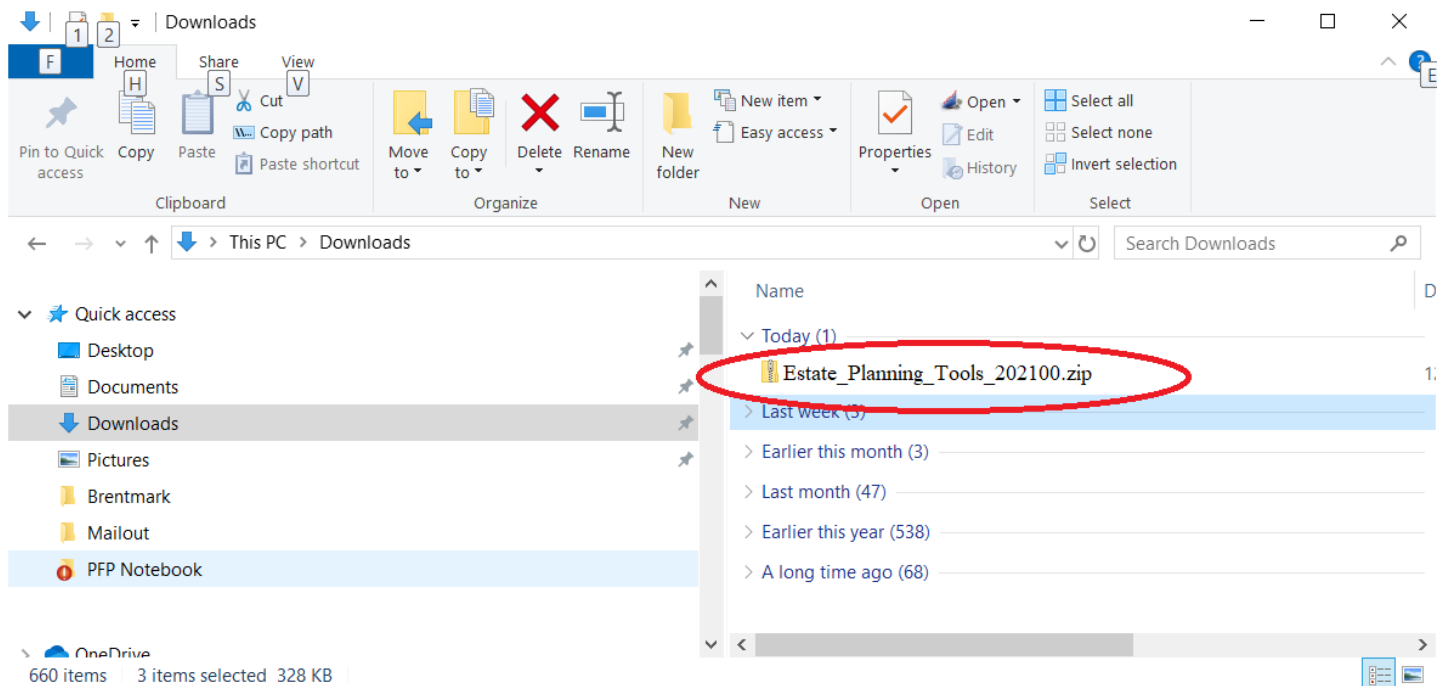
3. Click on “Download” on the next screen as well.



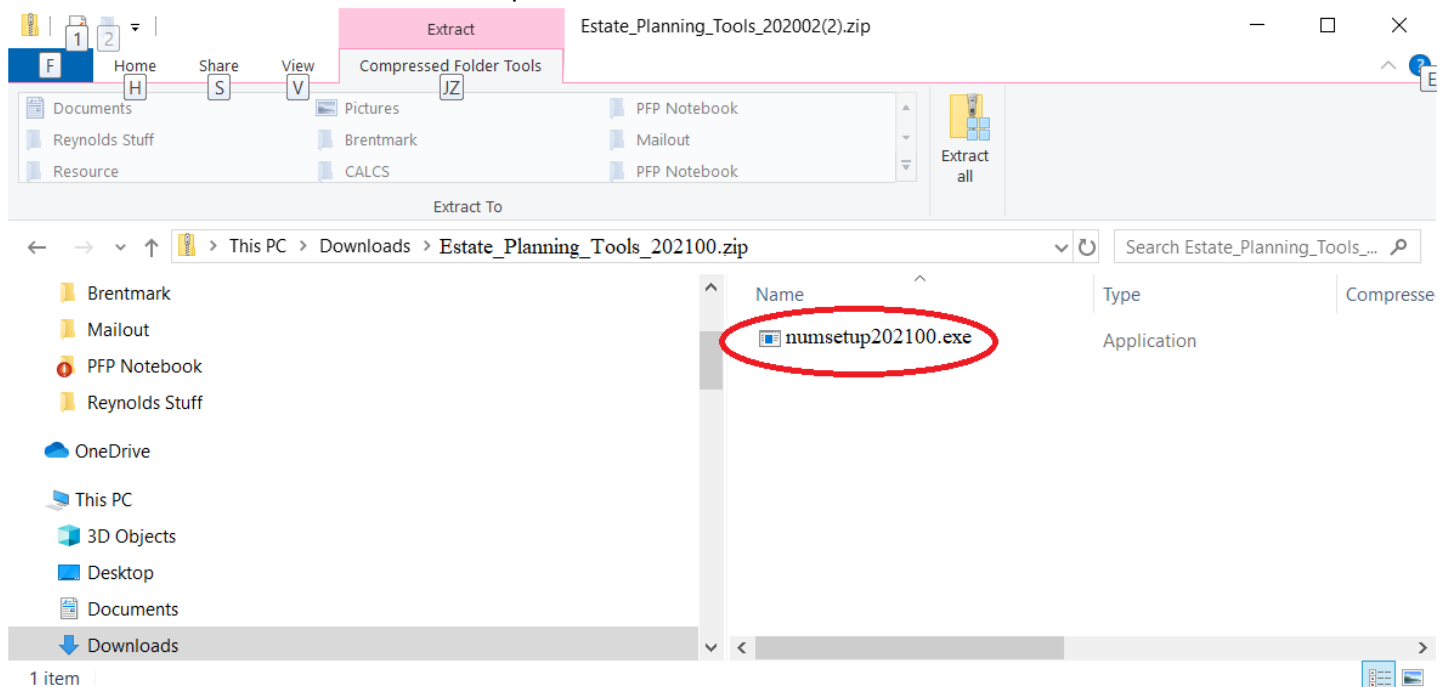
4. On the next screen click on “Save File”. This will download the zip file to your “Downloads” Folder. You can click on 'Open with' to unzip the file, but it will likely save the zip file to a temporary location, and you will need to download again if you want to reinstall.



5. Once the download is complete, navigate to your Downloads folder with Windows File Explorer. Locate the file that was downloaded (Estate_Planning_Tools_202100.zip). Double click this file.



6. Double click the installation file, numsetup202100.exe.



7. Follow the remaining steps you are prompted on to complete your installation.



ACCESSING YOUR PROGRAM ONCE YOUR INSTALLATION IS COMPLETE:

Now that you have completed the download and installation of Estate Planning Tools (Desktop) v.2021.00 you can access the program by clicking the shortcut on your desktop. You can also open the program by using the Windows File Explorer: Navigate to your program files folders, open the “*Brentmark*” folder and then the folder for “*Estate Planning Tools*”. In that folder, click on the application to open it.

REMINDER: You may always check release dates and version numbers at www.brentmark.com under software updates. In addition, the program now contains a Brentmark News Channel, which contains information about current releases.

If you encounter a problem with the 2021.00 installation, try to uninstall prior versions of Estate Planning Tools, and then retry the 2021.00 installation. If problems still persist, please e-mail: support@brentmark.com.

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.

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.