



Gift (Prepaid and Specific) Stock Calculations
Models in 10 Areas of Calculation
Retirement Calculations

X

X

Estate Tax Calculations

X

X

Federal and State Death Tax Calculations
(and 10 Areas)

X

X

Business, Investment, and Real Estate
Calculations

X

X

Financial Goals, Budgeting, Trusts, Her Works, and
Investment Calculations

X

X

General Analysis of Charitable Models

X

X

CRAT, CRUT, CLUT, GRAT, GRUT, GRIT,
and Alternated Estate Tax

X

X

X

Exhaustion and Complex Analysis of Charitable
Models

X

X

Rolling Trust Deductions Spread Over Years

X

X

Capital Gains Savings Realized by Implementing
Techniques

X

X

Private Income Funds

X

X

Charitable Remainder in Reverse Split Fund

X

X

Complex Charitable GR Annuity

X

X

CRAT as IRA Beneficiary

X

CRUT as IRA Beneficiary

X

IRA Conversion

X

Non-IRA Pays Life Insurance Premiums

X

IRA Withdrawal to Buy IRA with Insurance
Premiums Paid via Distributions from Non-
Retirement Accounts (Transfer Asset)
Rolling CRAT

X

Social Security Optimizer

X

Social Security Optimizer of Qualified Worker

X

Social Security Family Survivor Benefits

X

Social Security ABLE

X

Social Security Savings Plan

X

FASTPLAN™

X

MACRS Owner Company/Retiree

X

• More Coming Soon!

X