		Short Description	ECPLive	Estate Planning Tools	Charitable Financial Planner
Valuation	Capital	Capitalization of Income	Yes	Yes	
	Valuation EPS	Valuation Through Comparable Stock	Yes	Yes	
	Bookvalue	Book Value Method	Yes	Yes	
	Goodwill	Goodwill Valuation	Yes	Yes	
	Key Employee	Key Employee Valuation	Yes	Yes	
	Special Use	Special Use Valuation	Yes	Yes	
	Ratios	Financial Planning Ratios	Yes	Yes	
Tools of Estate Planning	Inclusion	Inclusion of CRAT, CRUT, GRAT, or GRUT	Yes	Yes	
	SCIN	Self-Cancelling Installment Note	Yes	Yes	
	Priv. Ann	Private Annuity	Yes	Yes	
	Factors	Annuity, Life Estate, and Remainder Factors	Yes	Yes	
	Gen. Skip	Simplified GSTT Worksheet	Yes	Yes	
	GSTT	Total Cost of GST Transfer	Yes	Yes	
	§529	Qualified Tuition Programs	Yes	Yes	
	Gift Loans	Gift Loans	Yes	Yes	
	Contingent Rev.	Contingent Reversion	Yes	Yes	
Trusts	QPRT	GRIT and Qualified Personal Residence Trust	Yes	Yes	Yes
	GRAT	Grantor Retained Annuity Trust	Yes	Yes	Yes
	Rolling GRAT	Rolling GRAT	Yes		
	GRUT	Grantor Retained Unitrust	Yes	Yes	Yes
	IDIT	IDIT Installment Sales	Yes	Yes	
	Dynasty	Dynasty Trust	Yes	Yes	
	SPLIT	Split Interest	Yes	Yes	
	Bypass	Bypass Trust Computation	Yes	Yes	
	QDOT	Qualified Domestic Trust	Yes	Yes	

Charitable	CRAT	Charitable Remainder Annuity Trust	Yes	Yes	Yes
	CRUT	Charitable Remainder Unitrust	Yes	Yes	Yes
	CLAT	Charitable Lead Annuity Trust	Yes	Yes	Yes
	CLUT	Charitable Lead Unitrust	Yes	Yes	Yes
	Table I	Naming a Charity as Beneficiary of Group Term Life Insurance	Yes	Yes	
	Pooled Fund	Pooled Income Fund	Yes		Yes
	Farm	Charitable Reminder in Residence or Farm	Yes		Yes
	Gift Annuity	Charitable Gift Annuity	Yes		Yes
	Interrelated	Interrelated Estate Tax	Yes	Yes	Yes
Estate Planning Techniques	Exclusion	Estate Tax Advantage of Gift Tax Exclusion	Yes	Yes	
	Redemption	Substantially Disproportionate Redemptions	Yes	Yes	
	§6166	Section 6166 Installment Payment of Estate Tax	Yes	Yes	
	§2057	Business Owner's Section 2057 Estate Tax Deduction	Yes	Yes	
	Income Shift	Advantage of Income Shifting	Yes	Yes	
	Install	Installment Sale	Yes	Yes	
	Group Term	Group Term Life Cost	Yes	Yes	
	§303	Section 303 Stock Redemptions	Yes	Yes	
	Harvester	Long-Term Capital Gains and Losses Harvester	Yes	Yes	
	Forecaster	Estate and Gift Tax Forecaster	Yes	Yes	
	5 & 5	Value of Income and "5 & 5" Power	Yes		
	Table 2001	Table 2001 (P.S. 58) Cost	Yes	Yes	
Taxes	Estate Tax	Gift and Estate Tax Computation	Yes	Yes	
	FastPlan	Fast Plan	Yes	Yes	
	Prior Gifts	Prior Gifts	Yes	Yes	
	Project	Projection of Estate Tax	Yes	Yes	
	Marital Ded.	Marital Deduction Optimization	Yes	Yes	
	Net Gift	Tax on a Net Gift	Yes	Yes	
	Individuals	Individual Income Tax	Yes	Yes	
	Corporate	Corporate Income Tax	Yes	Yes	
	Net Net Gift	Tax on a Net Net Gift	Yes	Yes	
	Fed Interest	Federal Interest Payable	Yes		
	State Interest	State Interest Payable	Yes		

Retirement	Lump Sum	Lump Sum Distributions	Yes	Yes	
	Confiscate	Retirement Plan Taxation	Yes	Yes	
	RMD	RMD During Lifetime of Owner	Yes	Yes	
	Pre 59.5	Pre-59.5 Distributions	Yes	Yes	
	CashNeed	Determination of Cash Requirements	Yes	Yes	
	CRATIRA	IRA Names CRAT as Beneficiary	Yes		
	CRUTIRA	IRA Names CRUT as Beneficiary	Yes		
	IRAMax	Retirement Account Distributions used to Buy Insurance	Yes		
	NUA	Net Unrealized Appreciation (NUA)	Yes		
Present and Future Value	Receipts	Present Value of an Annuity	Yes	Yes	
	Discount	Present Value of a Lump Sum	Yes	Yes	
	Deferred	Deferred Compensation	Yes	Yes	
	Compound	Future Value of a Lump Sum	Yes	Yes	
	Life Expect	Life Expectancy	Yes	Yes	
	Deposit	Deposit Growth	Yes	Yes	
	Future	Future Value of an Annuity	Yes	Yes	
	Chances	Chance of Survival	Yes	Yes	
§199A	General	§199A Deduction for SSTB and Non-SSTB	Yes	Yes	
	> Entity	§199A Deduction when Several Passthrough Entities are Owned	Yes	Yes	
	EstateTrust	§199A Deduction for Estate and Non-Grantor Trusts	Yes	Yes	
	SuperDed	Impact of Retirement Plan Contributions on §199A Deduction	Yes	Yes	
	C vs S Corp	C Corporation vs S Corporation	Yes	Yes	
	W2 vs 1099	W2 Employee vs Independent Contractor Analysis	Yes	Yes	
	Farm	§199A(g) Deduction for Specified Agriculture or Horticulture	Yes	Yes	
Social Security	Optimizer	Social Security Optimizer	Yes	Yes	
	Spousal	Social Security for Spouse of Qualified Worker	Yes		
	Family Max	Family Maximum Benefit	Yes		
	Survivor	Family Survivor Benefits	Yes		
	AIME	Average Indexed Monthly Earnings Calculator	Yes		
	Earnings Test	Retirement Earnings Test	Yes		
	Present Value	Social Security Benefits	Yes	Yes	
	Taxable Portion	Taxable Social Security Benefits Under OBRA 93	Yes	Yes	
	IRMAA	Income-Related Medicare Premium Adjustment	Yes	Yes	

Investments	Stock	Common Stock	Yes	Yes	
	Bond	Comprehensive Bond	Yes	Yes	
	Return	Annual Rate of Return	Yes	Yes	
	Analyzer	Investment and Cash Flow	Yes	Yes	
	HPR	Holding Period Return	Yes	Yes	
	Pr Val	Present Value of Investment	Yes	Yes	
	IRR	Internal Rate of Return	Yes	Yes	
Inflation	Erosion	Erosion of Purchasing Power	Yes	Yes	
	Fundlife	Fundlife Calculator	Yes	Yes	
	Assets	Inflation Adjusted Income Analysis	Yes	Yes	
	Income	Income Due to and Investment Fund	Yes	Yes	
	College	College Cost Estimator	Yes	Yes	
	Contribute	Contributions Required to Reach Goal	Yes	Yes	
	Sum Needed	Lump Sum Needed for Increasing Annuity	Yes	Yes	
Real Estate	After Tax	After-Tax Return on an Investment	Yes	Yes	
	Amortize	Amortization Schedule	Yes	Yes	
	Breakeven	Break-Even Period Refinancing	Yes	Yes	
	Compare	Mortgage Comparison Schedule	Yes	Yes	
	Double	Double Payments on Retirement of a Mortgage	Yes	Yes	
	Loan Rate	Break-Even Interest Rate Comparison	Yes	Yes	
	Mortgage	Mortgage Payment Calculator	Yes	Yes	
	Loan Payment	Loan Payment	Yes	Yes	
Insurance	Life ROR	Rate of Return on Life Insurance	Yes	Yes	
	Net Cost	Net Cost of Life Insurance	Yes	Yes	
	Net Clear	Net Clear Death Benefit	Yes	Yes	
	Buyout	Business Buyout Analyzer	Yes	Yes	
	Needs Analysis	Insurance Needs Analysis	Yes	Yes	
	Group	Total Cost of Group Term Life Insurance	Yes	Yes	
	Interrupt	Need for Business Interruption Insurance	Yes	Yes	
	DB ROR	Death Benefit Rate of Return	Yes	Yes	

Net Worth	Net Worth	Net Worth Analysis and Projector	Yes	Yes	
	Portfolio	Security Portfolio Analyzer	Yes	Yes	
	Social Security	Taxable Social Security Benefits Under OBRA 93	Yes	Yes	
	Withdraw	Periodic Withdrawals from an Investment	Yes	Yes	
	Compounding	How Compounding Builds Net Worth	Yes	Yes	
	Increase Pay	Future Value of Increasing Payments	Yes	Yes	
Financial Goas	Summary	Summary of Financial Objectives	Yes	Yes	
	Accumulate	Accumulation Planning Worksheet	Yes	Yes	
	Educate	Educational Funding Analysis	Yes	Yes	
	Retire	Retirement Analysis	Yes	Yes	
	Security	Social Security Benefits	Yes	Yes	
	Benefit	Present Value of Future Retirement Benefits	Yes	Yes	
	FET Discount	Federal Estate Tax Discount	Yes	Yes	
	IRMAA	Income-Related Medicare Premium Adjustment	Yes	Yes	
Budgeting	Budget	Income and Expenses Report	Yes	Yes	
	Cash Flow	Monthly Cash Flow Report	Yes	Yes	
	Dividend	Dividend and Interest Income Report	Yes	Yes	
	Loan Term	Term of Loan Calculator	Yes	Yes	
	Marginal	After-Tax Return and Cost Calculator	Yes	Yes	
	Outlay	Cost of an Outlay	Yes	Yes	
	Extra Pay	Extra Loan Payment Analyzer	Yes	Yes	