Intuitive Estate Planner

Version 11.0

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Version 11.0 of the **Intuitive Estate Planner (IEP)** contains the following enhancements, changes and updates:

- Interface: Totally revised Vista-like program interface with updated menu structure and updated menu buttons on the Toolbar
- Help: Revised, updated and enhanced HTML Help System with links to code sections, regulations, cases and research materials available on the internet—now accessible from the Toolbar
- Help: Separate Estate Planning Treatise accessed through a Help Index file organizing access to substantive topics, with advanced special materials, and with extensive links to internet resources, including articles, cases and primary tax research materials — now accessible from the Toolbar
- Diagram & Charts: Display of diagrams at Calculations/Diagrams, Gifts & Growth/Planned Sales/Worksheet and Assets/Partnership Interests/Worksheet upgraded and revised to conform with the new interface; treatment of state death tax at Calculations/Diagrams corrected; and the computations at Calculations/Chart for charitable percentage transfers and adjustment for state death taxes are corrected
- Assets/Annuities: Two-life calculation, percentage of annuity attributable to client and Schedule added to Annuities calculations
- State Estate/Inheritance Tax: State estate/inheritance calculations updated, including NE repeal; updated for 2007 rates and thresholds; updated Help Topic treatment of state estate/inheritance taxes and related planning; and state QTIP adjustment in the second estate of spouses corrected
- Planned Sales: The Private annuity calculation and Help Topic are updated to comply with the proposed regulations
- Planned Gifts/Charitable Planning: The inclusion of value in the estate of a grantor dying during the trust term is updated in the light of the June 2007 proposed regulations
- Distributions: Now enables inclusion of charities from Client Data/Other Heirs in the Distribution list for residue distribution
- Files: "Export files" added to the File menu to enable quick access to file exports in pdf, xls, and rtf formats
- Financial Analysis: Added post-death detailed Liquidity Analysis
- Utilities*:* GST Calculator utility to compute GST tax on Direct Skips and utility to compute future compound interest added; FGT calculation now will post the result to the prompt on which your cursor is located; Enter Projected Federal Estate Tax Rates now permits entry of year that entered rates expire; and the Private Annuity Calculation help topic is updated in the light of the new regulations
- Printing: Print Preview windows may now be minimized and resized.
- Slide Show: Updated for 2007/2008 and enhanced
- Tutorial: Reconstructed, enhanced and updated for changes in IEP Version 11.0 and the new interface

Special note: In the event of Congressional action on the estate tax, any new rates and applicable exclusion will be promptly available as a patch on the IEP Updates webpage (http://west.thomson.com/software/iep/default.asp). You may also enter proposed, or legislated, federal rates and exemptions at *Utilities/Enter Projected Federal Estate Tax Rates*. It is recommended that all users sign up for automatic e-mail notification of IEP updates at http://west.thomson.com/software/iep/default.asp. Further information on downloading IEP updates can be found in the IEP Help System under the Contents topic "IEP UPDATES".

INSTALLATION INSTRUCTIONS

Version 11.0 of the **Intuitive Estate Planner** program is furnished on a CD-ROM disk. IEP operates with Microsoft Windows® 2000, XP and Vista. It needs 100MB of hard disk space. To install it, perform these steps in the following sequence (please read all instructions before beginning the installation):

1. Turn the computer on and launch your Windows system.

2. It is recommended that you exit all other applications before beginning the installation procedure.

3. Installing **Intuitive Estate Planner Version 11.0** will replace **Intuitive Estate Planner Version 10.0** on your computer. (You may retain Version 10.0 by renaming its directory from "IEP" to something else before installation of Version 11.0)

4. Insert the **Intuitive Estate Planner Version 11.0** CD-ROM disk into your CD-ROM drive.

5. The program will begin installation; follow the instructions on the screen. (If it does not begin, click on the Start button and select Run on your Windows Desktop. At the Run prompt type "[Drive letter of your CD-ROM drive]:setup" and then click on "OK" and follow the instructions on the screen.) The program will be installed by default in the directory "C:\IEP" or may be installed in a directory of your choice.

To install the **Intuitive Estate Planner Data Entry Module, Version 11.0**, for independent entry of data by clients or others, in the directory "C:\IEP\DataEntry" (by default) or another directory of your choice:

1. Install **Intuitive Estate Planner Version 11.0** as directed above.

2. Follow steps 1, 2, and 4 above, but when the program installer screen comes up, click on Cancel and Exit Setup to exit the program installer.

3. On your Windows desktop, click on Start and select Run.

4. In the Run box type "[Drive letter of your CD-ROM drive]:Datsetup" and click "OK" and follow the instructions on your screen.

5. You may copy the file "Datsetup" from the installation CD-ROM for distribution to clients as a convenient means for them to enter their estate data. The data so entered may be easily transferred to the **Intuitive Estate Planner** program as the Baseline data for you to use in developing an estate plan.

To install the **Intuitive Estate Planner Online User Manual** and **Client Forms** (furnished in PDF format, requiring Adobe Acrobat® Reader to view):

- During the installation of IEP select the check box "IEP Online Manual" on the Select Components screen.

- During the installation of IEP select the check box "IEP Client Forms" at the Select Components screen.

- To view or print out the Online Manual, launch IEP and at the Help menu click on “The IEP Manual.”

- To view the Client Forms (Data Assembly Forms and updated Client Report and Explanation documents), launch IEP and at the Utilities menu click on “Client Forms PDF”.

You must have Adobe Acrobat® Reader installed on your computer to view the Online User Manual and the Client Forms PDF file. To download and install the most recent version of Acrobat Reader, without charge, go to the Adobe Website at: http://www.adobe.com/products/acrobat/readstep.html or go to the IEP Help file at “Help System, Files, Scenarios, Pricing/Adobe Reader” and click on the Adobe Website link.

For the HTML Help system on IEP to operate correctly you must have Internet Explorer V.6.0 or later installed.

For further details on these installations, please see Chapter 1 of the **Intuitive Estate Planner User Manual**. Note, however, that Acrobat Reader must first be manually installed, as above directed, to view the User Manual.

EVP INTERFACE MANUAL

In addition to instructions in the IEP Help system, the IEP CD-ROM includes a separate manual on the operation of the “EVP Interface” for online securities pricing through the Estate Valuation and Pricing Systems, Inc. (EVP) product *EstateVal*. You may copy this document from the CD-ROM to view or print out, in Microsoft Word® (EVP.doc) or in Adobe Acrobat (EVP.pdf). Note that the *EstateVal* program is furnished without charge through the EVP website, but regular EVP/*EstateVal* charges apply to each securities evaluation you order.

EXAMPLE FILES — INSTALLATION AND APPLICATION

Installation of Example File: To install the Example file during the installation of IEP, you need only be sure that the check box “IEP Sample Files” is selected at the Select Components screen during installation of IEP. To bring up the Example file, set the Directory at “Existing Clients” to C:\IEP\Samples.

Files Included: The Example file is named “John Example 11”.

> The “John Example 11” file illustrates how to enter data for many of the components of the program. It displays example entries and calculations for either Client and Spouse or One Person. Browse through the tabs to see the example scenarios, data entry and calculations. The scenarios demonstrate how an estate plan may be built from the Baseline data entries and choices in increments or alternates. It also demonstrates how IEP computes Sec. 6166 and Sec. 2032A eligibility.
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> To vary the example values, simply enter Asset and Deduction values as you choose. To demonstrate the effect of gifts and growth, proceed to the tab Client Data/Estate Assumptions to set a default growth rate, and go to Gifts & Growth/Choices to set gift amounts and the number of years until the estates occur. Then go to Calculations/Scenario Selection. Select Gifts & Growth: Comparison and choose the scenarios you desire to compare. Results can then be viewed at Calculations/Tax Analysis, Calculations/Chart and Calculations/Diagrams. (The bar chart is limited to five alternates. Select only one scenario at a time for spouses, to best demonstrate the effects of gifts and growth.)

FREE IEP TRAINING AVAILABLE

Free training sessions that will help you get started with IEP and use it efficiently are available with Thomson/West Reference Attorneys. To schedule a training appointment call 1-800-328-0109 and dial option “1” when prompted.

Thank you for using
Intuitive Estate Planner!

Have questions or need help? Please call customer Technical Support at 1-800-277-9378.