

# Heckerling Institute Report

## Report #1 - Software and Vendors

The following is Report #1 from our on-site reporters regarding some of the highlights from the events and presentations that are taking place at the 34th Annual Philip E. Heckerling Institute on Estate Planning that is being held January 10-14, 2000 at the Fontainebleau Hilton in Miami Beach, Florida.

First, Institute Director, Tina Portuondo reports that the Institute did not suffer any Y2K glitches either, although they did schedule it a week later than usual this year just to be safe given that so many of the participants were going to be flying into Miami to attend the Institute.

This Report covers the Software and some of the other Vendors who are exhibiting at the Institute.

### **The software vendor list this year includes (in alpha order):**

Advanced Logic Systems, Inc. [DAE for W&T and Probate]

BNA Software/Tax Management [ETP, ITP, etc.]

Brentmark Software Inc. [CFP, RIA, etc.]

CCH Inc. [ViewPlan's Vista, etc.]

Crescendo Planned Gifts Software [Pro and Lite]

Eidelman Associates [DAE for W&T]

Evaluation Services Inc. [On-line Valuations]

EVP Systems Inc. [On-line Valuations]

Financial Data Services Inc. [On-line Valuations]

InsMark Inc. [EP Systems]

The Lackner Group Inc. [6-in1 FAS]

Lawgic Publishing Company [CA and FL W&T Systems]

Lexite Development [ZCalc]

Matthew Bender/Lexis Publishing [HotDocs, etc.]

Ocaso Software

PenD'Calc Corporation [Retirement, IRA]

ProBATE Software [FAS, EP]

ProDoc, Inc. [EP, EA, W&T]

RIA Group [WTP, EP, etc.]

Schumacher Publishing [RLTs and Web Sites]

SunGard Trust Systems [W&T]

The Technology Group [Wealth Transfer Planning]

U.S. Trust Company of New York [EPlan, etc.]

West Group [IEP, DWTA, etc.]

Zane & Associates Inc. [FAS]

The initial rumors afloat along vendor row and elsewhere included the following:

