Report 3B

A complete listing of the proceedings and speakers is available on **the Institute's Web site**

Technology (pt.2)

First, this Report 3B is a continuation of Report 3A, being Jason Havens' continuing report on the **Vendor's Exhibit Hall**.

C. TRUST ACCOUNTING & RELATED ADMINISTRATION SOFTWARE:

1. The Lackner Group, Inc. (http://www.lacknergroup.com): The Lackner Group, Inc. has consistently offered a single-entry estate administration program known as the 6-in-1 Estate Administration System. This system produces the 706, 1041, the accounting and inventory for the estate administration, and relevant state tax forms as well. The 6-in-1 Estate Administration System is a Windows- or Mac-based system that includes the latest tax preparation forms, including the updated Form 1041. Lackner has also updated its system to anticipate all known "decoupling" states (i.e., those states that are deviating from the "pick-up" tax, based on the state credit for federal estate taxes). Lackner is compatible with the well-known File Maker Pro database program. The Lackner modules are priced separately.

2. Thomson/West (TM) (http://west.thomson.com): Fast-Tax (http://www.fasttaxtrust.com) gives the trust administration user the ability to produce tax forms. Fast-Tax interacts with Zane fiduciary accounting software, which is also part of the Thomson group. Products are priced separately.

3. Bureau of National Affairs (BNA) (http://www.bna.com): BNA (http://www.bnasoftware.com) offers two automated systems: an updated 706 program that already incorporates the increased applicable exclusion amount and a newly-updated 709 program. The 709 program now allows you to move gifts easily within the return by highlighting and "right-clicking" on the particular gift that you want to move to a different part of the return. Navigation within the 709 is also improved. "Demo" versions for both products are available at the BNA booth.

4. Financial Data Service, Inc. (http://www.financialdata.com): This program produces the 706 and 709 transfer tax returns, as well as probate reports and other items.

5. Selden Integrated Systems/ProBATE (TM) Software (http://www.probate-software.com): ProBATE Software offers fiduciary accounting and tax compliance software, including the preparation of Forms 706, 709 and 1041, as well as estate planning software and a digital workflow program through iKE Office.

6. FASTER Systems, LLC (http://www.fastersystems.com): FASTER software offers a single-entry system for fiduciary accounting.

7. DataTech SoftWare, Inc.: DataTech's Quick & Easy (TM) (http://www.quickandeasy.com) (tax preparation) now offers a complete suite of estate administration tools called Estate.suite (TM) (http://www.estatesuite.com/). You may also purchase individual tax and fiduciary administration modules from the main Quick & Easy website.

8. EstateWorks (http://www.estateworks.com): EstateWorks is a web-based system that tracks and assists with the preparation of estate administration matters. Users can "click" through any part of the program and can see at a glance the status of cases and a checklist for each case. EstateWorks generates documents and merges data into word processing files and other formats.

D. APPRAISAL & VALUATION SOFTWARE:

1. Estate Valuations & Pricing (EVP) Systems, Inc. (http://www.evpsystems.com): EVP has released an updated version of its excellent stock and bond valuation software, and this software is now free for the asking, although you need to register as a user.

2. Other appraisal and valuation vendors abound, and will be featured later as time permits.

E. RESEARCH SOFTWARE & SERVICES:

1. Lexis-Nexis (http://www.lexis.com): Lexis features numerous estate planning titles in its Estate Practice and Elder Law Library, including the University of Miami Philip E. Heckerling Institute on Estate Planning materials. You may also purchase the presentation materials on CD-ROM this year for approximately $140.

2. Thomson/West (TM) (http://west.thomson.com): West offers a number of estate planning research tools as well.

3. Bureau of National Affairs (BNA) (http://www.bna.com): As most of you know, BNA offers excellent research tools, including the well-known Tax Management Portfolios (one of my favorite research tools) (http://www.bnatax.com/tm/tmil.htm). You might not know, however, that BNA now allows you to jump from the Portfolios to the primary sources and back again. Previously, users could "click" a footnote and view the primary source. Now, you can accomplish the reverse by determining where a primary source is discussed in the Portfolios. A "demo" is available on the BNA website (http://www.bnatax.com/tm/tmil.htm).

F. MISCELLANEOUS VENDORS:

1. Connect2A.com (http://www.connect2a.com): Connect2A.com allows estate planning professionals to track their clients' assets and estate planning techniques via an Internet-based service that is encrypted and more secure than almost all private law firms' internal servers. Connect2A offers excellent training, from their Internet-based presentations powered by WebEx technology (http://www.connect2a.com/C2Ademo.html), which cover basic aspects of Connect2A, setting up trust information in Connect2A, and the trust funding process of Connect2A, to their in-depth training sessions for the estate planning team. One of the most attractive aspects of Connect2A's service is the ability to track asset and beneficiary changes during the trust funding process. Connect2A's system is also compatible with HotDocs (R) and thus is compatible with other estate planning programs such as Financial Profiles and WealthCounsel. The Connect2A service costs $60 per month, billed quarterly.

2. The Capital Trust Company of Delaware (http://www.ctcdelaware.com): The Capital Trust Company of Delaware's site includes many useful Adobe Acrobat one-page summaries on basic and advanced estate planning techniques, which are excellent when explaining a concept to a client who would prefer a picture. Presentations are also available, as well as sample forms and provisions and

extensive information on the application of Delaware law. Most of the mentioned materials are located in the "Personal Trust Services" area under the "Trusts" heading on the top navigation bar.

Registration is no longer required to access these materials. Visitors may still register for a free e-newsletter, however, which contains planning discussions and recommendations from some of the helpful Capital Trust Company of Delaware team members.

3. Foundation Source (R) (http://www.foundationsources.com): Foundation Source offers administration services for private foundations. These services include maintenance of governing documents, tax filings, and grant processing and compliance. Investment services are not included and are not intended in the scope of the offered services.

4. Power Presentations (http://www.power-presentations.net): This company offers packaged presentations for estate planning seminars and client presentations.

5. Schumacher Publishing, Inc. (http://www.estateplanning.com): This company markets packaged websites for estate planning attorneys plus numerous printed materials.

If any vendors or any important developments were omitted that we should have mentioned, please stay tuned. We will attempt to cover all items of interest in future reports as time permits.

Second, here is an **ANNOUNCEMENT** of special interests to all estate planning attorneys about the upcoming ABA TechShow 2004:

The **2004 ABA TechShow**, which will be held in Chicago **March 25-27, 2004**, will feature for the first time an all-day Tract on Thursday, March 25, 2004 that is being co-sponsored and presented entirely by members of the ABA Real Property, Probate and Trust Law Section. The four panel presentations that will be held that day will be the following:

RP.01: Electronic Estates: Virtual Trips to the Courthouse
James Creamer, Donna Killoughey
Explore the current state of electronic filing in probate and surrogate courts. Learn about the special issues that are presented by e-filing
when the original wills, trusts and other documents are not in an electronic format that permits them to be proved-up as valid originals under current state and federal law. This program will also cover e-wills, e-trusts and related health care documents in light of UCITA and related state and federal legislation. Special focus will be given to the experience in Colorado, which two years ago became the first state in the nation to permit e-filing in every one of its trial courts.

RP.02: The Electronic Transaction from A to Z - Tools for Doing the Deal Online
Nancy Grekin, Gerald Hoenig, George Meyer
With e-mail you can put anything authored by one attorney on another attorney's desk instantly. The revised document can be returned by e-mail. What's next on the horizon? Soon you'll be using deal rooms and extranets to negotiate and to collaborate on the preparation of transactional documents. Are you still spending your days marking up the last document you

used in a similar deal with a pencil, looking for the letter from last week that contains critical information, or feeding paper into a fax machine? Find out how you can use document assembly to streamline document production, how to send and receive a fax without ever producing a piece of paper, and how to use document preparation and management technologies to make your transaction as paper-less as possible.

RP.03: The Electronic Transaction from A to Z - Closing the Deal Without Leaving Your Office
Nancy Grekin, Gerald Hoenig, George Meyer
Tired of getting on airplanes to close deals? Online electronic closings are now being done in many locales. Learn about the electronic signatures acts, how to obtain an electronic signature and how they are validated. Discover the advanced features of Adobe Acrobat which facilitate the creation of electronic closing binders and electronic signatures.

RP.04: Bits And Bytes Meet GRITs and GRATs Alphabetizing Estates By The Numbers
Roger Shumaker, Amy Mendelsohn
Long hand calculations of potential estate taxes and tax avoidance planning is a thing of the past. New software helps you easily determine how to effectively preserve assets and meet the distribution goals of the grantor. Learn how to accurately calculate estate planning alternatives, and then demonstrate the options to your clients with graphics. Once the choice is made, learn how to quickly and economically generate the plan documents, significantly reducing your document production time.

The normal registration fee for TechShow is $695 if paid for by 2/26/04, else $795. However, since the RPPT Section is a Program Promoter this year, and if you are a member of the RPPT Section, you qualify for a reduced registration fee of only $595 if paid for by 2/26/04, else $695. However, in order to be eligible for that reduced fee, you have to use the **Program Promoter Code #24** when you register.

You can also register for one day only for $295 if paid for by 2/26/04, else $345. Law students can register for all three days for $145 if paid for by 2/26/04, else $195. Admission to the Exhibit Hall only (which rivals the Heckerling Exhibit Hall in size and number of vendors) is free this year.

For more information and the details about all the programs that will be offered over the three days of the show, go to www.techshow.com, as there will be additional tracts for Litigation & Electronic Discovery, Wireless, Security & Privacy, Knowledge Management, General, Solo & Small Firm, Strategies & Best Practices, Advanced IT and (this is new) the Technology Training Institute.

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