

ACTEC Software Survey

Technology in the Practice Committee

Reviewer Name**Date (mm/dd/yyyy)****Operating System****Software being reviewed:****Version Number, if any:****Vendor Name:****Vendor URL:****How long have you used the software?**

	Demo only	Less than 1 year	1-3 years	4-6 years	7-9 years	10+ years
Software usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

How satisfied are you with the software?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Customer support	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of Use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Overall, does this software meet your needs?

- Yes
 Somewhat
 No

Have you used any software in the same category? If so, please include name:

I tried using Tiger Tables about 8 years ago.

Please provide a substantive review of this software below.

I like using NumberCruncher for its calculators. It includes both estate planning and financial planning tools, both of which are useful. I use it to amortize promissory notes, to calculate present value and to calculate split interests for trusts such as QPRTs, GRTs, CLTs and CRTs. I also use it to calculate estate, gift and state inheritance taxes.

I find the "?" tab especially useful when I am trying to figure out exactly what is being calculated in a given menu option, as its provides a very knowledgeable and detailed explanation.

One challenge I find is that there are so many menus, it takes time to become familiar with which calculations are performed in each - for example the life estate/remainder interest calculation if found under "Tools of Estate Planning/Factors."

There are many tools that I do not use, such as the ability to track cash flow and budgeting for businesses.

Please return your completed survey to
Karen Stockmal at karen.stockmal@kmslawoffices.com.

All surveys will be reviewed before being submitted
for publication on the private side the ACTEC website, www.actec.org.