ACTEC Software Survey
Technology in the Practice Committee

Reviewer Name

James Lamm

Date (mm/dd/yyyy)

09/25/2017

Operating System

Windows 10

Software being reviewed:

zCalc/ Estate Planner Suite

Version Number, if any:

2017.1.1.3

Vendor Name:

Thomson Reuters

Vendor URL:

http://tinyurl.com/yd4mu6nd

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	○	○	○	○	●	○

How satisfied are you with the software?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	○	○	○	○	●
Price	○	○	○	●	○
Customer support	○	○	●	○	○
Ease of Use	○	○	○	●	○

Overall, does this software meet your needs?

● Yes

○ Somewhat

○ No

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

TigerTables, NumberCruncher, CrescendoPro

Please provide a substantive review of this software below.

The zCalc / Estate Planner suite computes tax and financial results for a variety of estate planning tools. The Estate Planner Tool Box includes complete computation models for GRATs, CRTs, CLTs, QPRTs, installment sales, SCINs, private annuities, and more. These computation models also are available as Microsoft Excel spreadsheets so that you can customize the models further. For individuals with proficiency in Microsoft Excel, the real benefit of zCalc is the included Excel function library add-in, which provides 28 estate and gift tax functions, 26 income tax functions, 11 term and life functions, 6 unitrust functions, 6 GRAT and QPRT functions, 8 charitable trust functions, 10 retirement planning functions, 5 life insurance functions, and 21 other estate planning-related functions. These functions streamline and simplify the process of creating your own custom Excel spreadsheets to compute estate, gift, and income tax results and projected benefits to family members or charities. The Excel functions include current and historical tax rates, tax brackets, exclusion amounts, and mortality tables. The built-in help information clearly describes the arguments and options needed to use the zCalc functions. This is a must-have product for estate planners who are proficient in Excel, and the included Estate Planner Tool Box models allows individuals who aren't proficient in Excel to compute the results for a variety of advanced estate planning tools.

Please return your completed survery 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.