

WealthTec® PlanXPRT

Advanced Planning Back Office Support

For Professional Wealth Advisors

WealthTec LLC

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WealthTec PlanXPRT Overview

- Advanced planning back office report generation
 - Strategic wealth planning illustrations
 - Integrated cash flow analysis
 - Complex tax planning
 - Comprehensive estate planning
 - Tactical wealth planning illustrations
 - Focused, on-the-margin financial, tax and estate planning
 - Cutting-edge techniques with comparisons to baseline
- Developed by the author of WealthTec Suite, a former practitioner specializing in planning for HNW and UHNW clients
 - CPA/PFS, CFP[®], CEPA[®], CPWA[®], CIMA[®], RMA[®], CTFA, CLU[®], ChFC[®]

Strategic Wealth Planning Reports

- Comprehensive lifecycle planning
 - Integrated lifetime cash flow and net worth projections
 - Detailed income tax calculations, including AMT & QBID
 - Extensive employer stock modeling capabilities
 - Lump-sum distributions with net unrealized appreciation
 - Roth IRA conversions
 - Executive compensation plans
 - Basic-to-advanced estate planning
 - Monte Carlo simulations
- Side-by-side case comparisons

Strategic Estate Planning Reports

- Comprehensive estate planning
 - Flowcharting
 - Specific bequests
 - Bypass trusts, marital trusts and ILITs
 - Outright gifts
 - Family entities with valuation discounts
 - Estate freeze planning with split-interest trusts
 - Planned charitable giving
 - Lifetime and testamentary GST planning
- Side-by-side case comparisons

Tactical or Focused Planning Reports

Tax-Deferred Plans

- Leveraged IRAs
- Roth IRA conversions
- IRA to CRUT
- Nonqualified plan to CRUT

Planning with Life Insurance

- Pension maximization
- Buy term and invest the difference
- CRTs + wealth replacement trusts

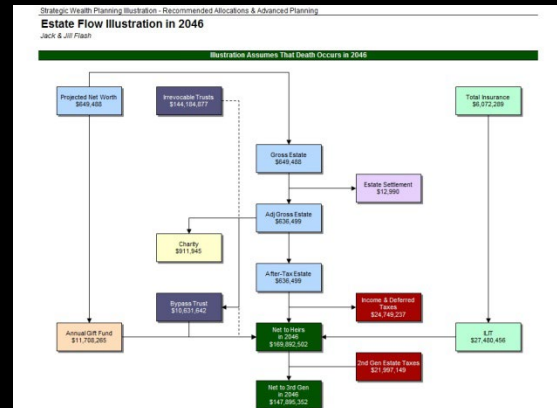
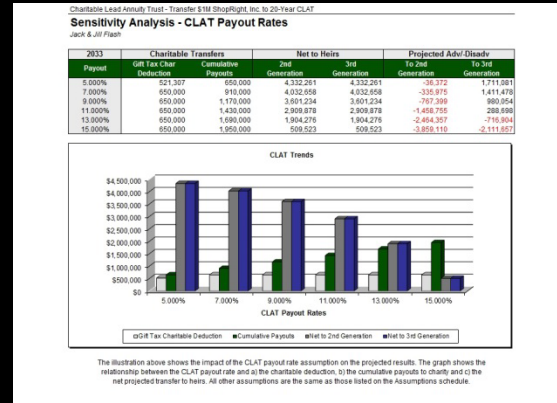
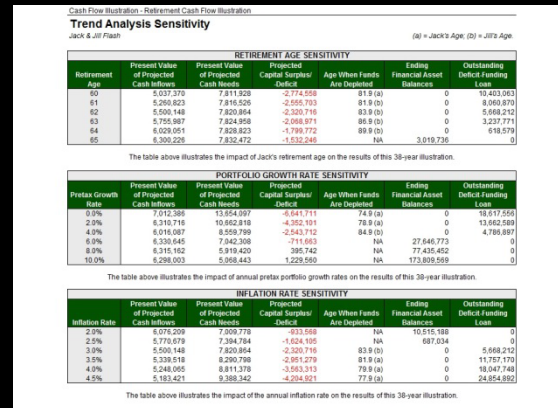
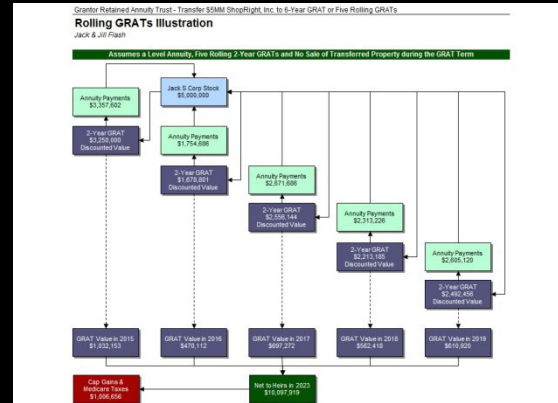
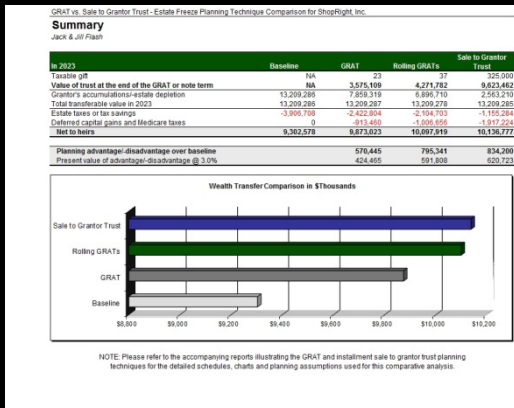
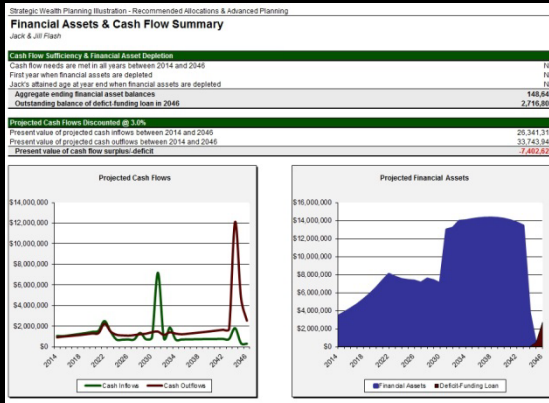
Estate Freeze Techniques

- Sale to grantor trust
- Rolling GRATs
- RPM annuity trusts
- Outright gifting techniques
- SCINs and private annuities

Planned Charitable Giving

- CLTs, CRTs and gift annuities
- Specialized NIMCRUTs
- Charitable GRATs

WealthTec PlanXPRT Screenshots



WealthTec PlanXPRT Summary

- Advanced planning back office support via report generation
- Strategic and tactical wealth planning illustrations
- What-ifs and side-by-side case comparisons
- Developed by a highly-credentialed planning practitioner and software developer
- Can supplement or replace in-house financial and/or estate planning software
 - Reduces investment in technology and training
 - Allows for increased client face time