

CALIFORNIA JUDICIAL COUNCIL FORMS STATE TAX FORMS FEDERAL TAX FORMS FIDUCIARY ACCOUNTING CALIFORNIA ACCOUNTING FORMAT



A COMPLETE INTEGRATED PROBATE SYSTEM FOR CALIFORNIA.



◆ WHAT FEATURES ARE ESPECIALLY BENEFICIAL TO CALIFORNIA PROFESSIONALS?

- **TRACKING, ALLOCATIONS, AND DISTRIBUTIONS.** Heritance tracks all creditors, interested parties and beneficiaries, including any payees, joint owners or trustees. You can review and edit these lists from multiple views and this information can transfer to applicable Judicial Council forms.
- **FIDUCIARY ACCOUNTING, CALIFORNIA JUDICIAL COUNCIL FORMS, CALIFORNIA STATE ESTATE FORMS, AND FEDERAL FORMS INCLUDING THE 706, 709 AND 1041 ARE ALL INCLUDED.** We believe Heritance is the only completely integrated probate system on the market today. Information flows easily to any form.

- **AUTOMATE THE PREPARATION OF NOTICES.** Heritance gives you powerful multi-level integration that not only transfers accounting data to forms and reports – it shares other data (such as creditors, interested parties, beneficiaries and inventories) and fills this information into the integrated Judicial Council forms.

- **COMMUNITY PROPERTY AND APPRAISED VALUES ARE EFFECTIVELY HANDLED.**

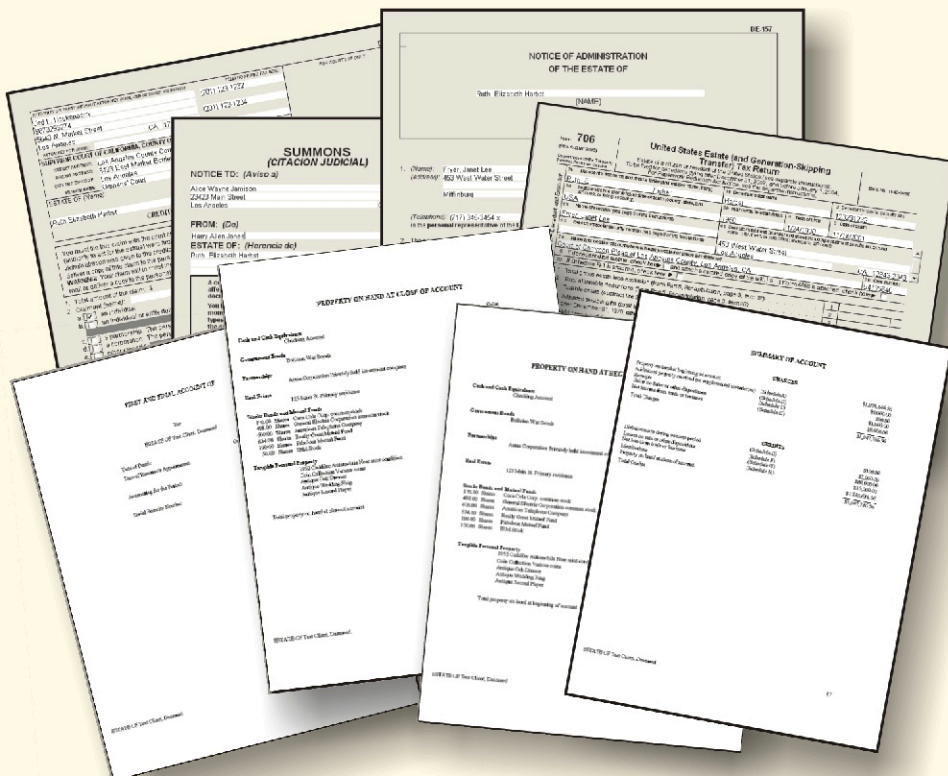
COMMUNITY PROPERTY: Simply click on the Community Property check-box and Heritance shows the full value in the item description along with an explanation, and puts 50% of the value in the appropriate column.

APPRAISED VALUES: Heritance shows the full value in the item description, and you can enter an explanation for an appraised value other than the full value. The appraised value is placed in the appropriate column. This feature can be combined with the Community Property feature.

◆ CAN I PURCHASE AND USE THE ACCOUNTING AND FORMS MODULES SEPARATELY?

Yes, each module works independently as a full-featured program. But the full power of the Heritance System is obtained when all modules work together hand-in-hand, providing multi-level integration and one-time data entry. Heritance has been designed as a modular solution to provide quality features, integration, and a cost savings for full-system purchases. Our customers use Heritance in a wide variety of ways:

- Complete Integrated Fiduciary Accounting, Probate and Tax System.
- Fiduciary Accounting.
- Trust Management.
- Automated Judicial Council Forms.
- Automated State and Federal Tax Forms.



Accounting and other data (such as inventories, beneficiaries, creditors and interested parties information) is shared within Heritance and automatically fills into the integrated Judicial Council Forms, the California State and Federal Tax Forms, and the California Accounting report.

CALL US TOLL-FREE, OR SEND US AN E-MAIL, TO DISCUSS YOUR OWN SPECIAL REQUIREMENTS AND TO SEE HOW THE HERITANCE SYSTEM WILL WORK TO MAKE YOUR PRACTICE MORE EFFICIENT, MORE ACCURATE, AND MORE PROFITABLE.

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