

Crescendo Product Comparison

Program	Estate	Lite	Pro
Gift Annuities			
Current One or Two Life	X	X	X
Deferred		X	X
Flexible		X	X
Gift Plus Insurance			
Retirement Annuity	X		X
Annuity for Home			X
Unitrusts			
One to Eight Lives	X	X	X
FLIP Unitrust	X		X
Term of Years			X
FLIP Term of Years			X
Life Plus Term of Years	X		X
Education Unitrust			X
Retirement Unitrust/FLIP	X	X	X
Sale/Unitrust	X	X	X
Home Sale/Unitrust			X
Unitrust and insurance	X	X	X
Testamentary Unitrust/IRA	X		X
Living Lead Trust			X
Testamentary Lead Trust	X		X
Annuity Trusts			
One and Two Lives	X	X	X
Three to Six Lives			X
Term of Years			X
Education Annuity Trust			X
Living Lead Trust			X
Testamentary Lead Trust			X
Pooled Income Funds			
Lead Unitrusts	X		X
Lead Annuity Trusts	X		X
Double Discount Lead Trust	X		X
Lead Super Trust	X		X
EZ Lead Trust	X		X

Program	Estate	Lite	Pro
Life Estate Reserved			
			X
Current Gifts			
Income Taxes			X
Capital Gains			X
Gift/Sale	X		X
Corporate Repurchase			X
Bargain Sale			X
Charitable Estate Models			
Married Couple	X		X
Surviving Spouse	X		X
Single Person	X		X
Testamentary Plans			
Remainder Unitrust	X		X
IRA to Unitrust	X		X
Bequest	X		X
Documents			
One and Two Life Unitrust	X	X	X
FLIP Unitrust	X	X	X
Term of Years Unitrust			X
Testamentary Unitrust	X		X
Current Gift Annuity	X	X	X
Deferred Gift Annuity		X	X
Living Annuity Trust	X		X
Term of Years Annuity Trust			X
Living Lead Trust	X		X
Testamentary Lead Trust	X		X
Worksheets			
Annuity Trust	X		X
Lead Trust UT/AT	X		X
Unitrust	X		X
Estate Planning			
Estate Tax Calculation	X		X
Grantor Retained Unitrust	X	X	X
Grantor Retained Annuity Trust	X	X	X
Qualified Personal Residence Trust	X	X	X

Crescendo | Total
Interactive | Planned
Giving
Solutions

Software / Education / Multimedia / Internet