

# Vanilla Announces New AI-Powered Estate Planning Innovations

*New AI features to accelerate how financial advisors and wealth advisors can serve high-net-worth clients at scale*

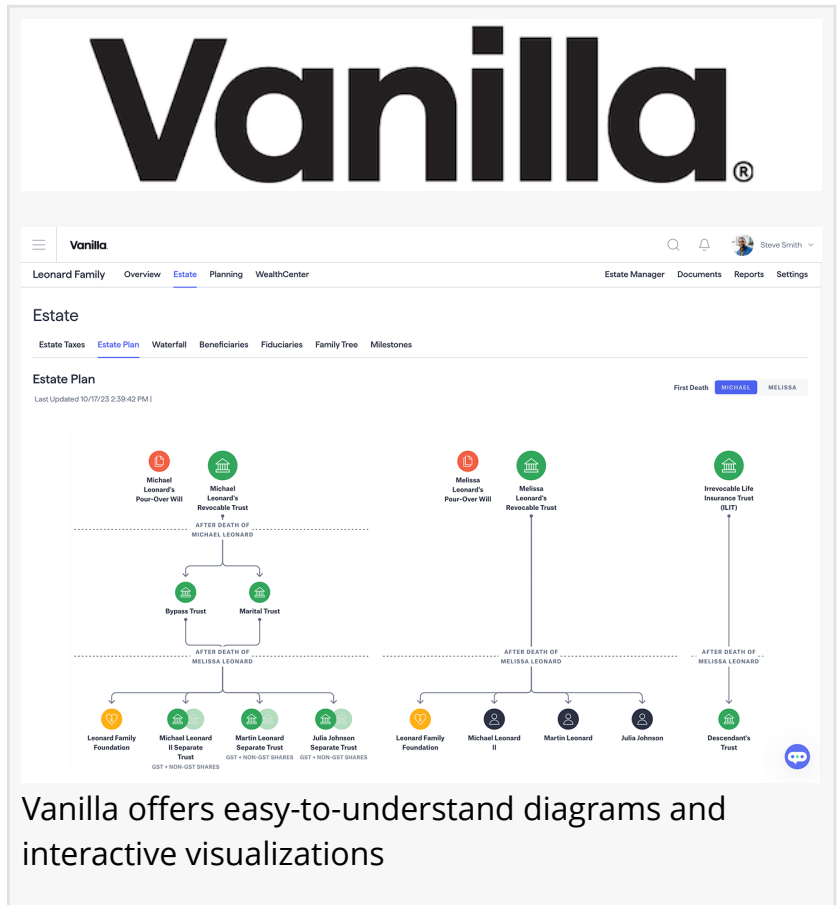
SALT LAKE CITY, UTAH, UNITED STATES, October 19, 2023 /EINPresswire.com/ -- Vanilla, a leading provider of estate planning solutions, today announced several new cutting-edge tools for advisors powered by VAI™, a proprietary AI model purpose-built by Vanilla to enhance the estate planning experience.

At launch, VAI will power new features like Vanilla Estate Builder™ that will reduce the time it takes to turn estate documents into powerful diagrams, federal and state-specific estate tax projections, and beneficiary summaries. The new Vanilla

Scenarios™ will leverage VAI to understand the client's family structure, proactively identify planning opportunities, and help advisors stay ahead of client issues. Over time, VAI will be extended across the platform to support ongoing advisor and client education, improve plan implementation, and proactively identify how changes in law and regulations will impact client's plans.

"We're proud to introduce comprehensive, tech-forward solutions that make it easy for wealth planners and advisors to deliver proactive planning advice to clients at enterprise scale," said Gene Farrell, CEO, Vanilla. "We anticipate that these tools will be particularly impactful in helping to develop plans for high-net-worth clients, accelerating and simplifying what has traditionally been a complex process."

Firms such as Vanguard, Mariner Wealth Advisors, Balentine, Avantax, and CapSouth Wealth



**Vanilla**

Leonard Family Overview Estate Planning WealthCenter Estate Manager Documents Reports Settings

Estate

Estate Taxes Estate Plan Waterfall Beneficiaries Fiduciaries Family Tree Milestones

Estate Plan  
Last Updated 10/17/23 2:39:42 PM First Death MICHAEL MELISSA

Michael Leonard's Peer-Over Will Michael Leonard's Revocable Trust

AFTER DEATH OF MICHAEL LEONARD

Bypass Trust Marital Trust

AFTER DEATH OF MELISSA LEONARD

Melissa Leonard's Peer-Over Will Melissa Leonard's Revocable Trust Irrevocable Life Insurance Trust (ILIT)

AFTER DEATH OF MELISSA LEONARD

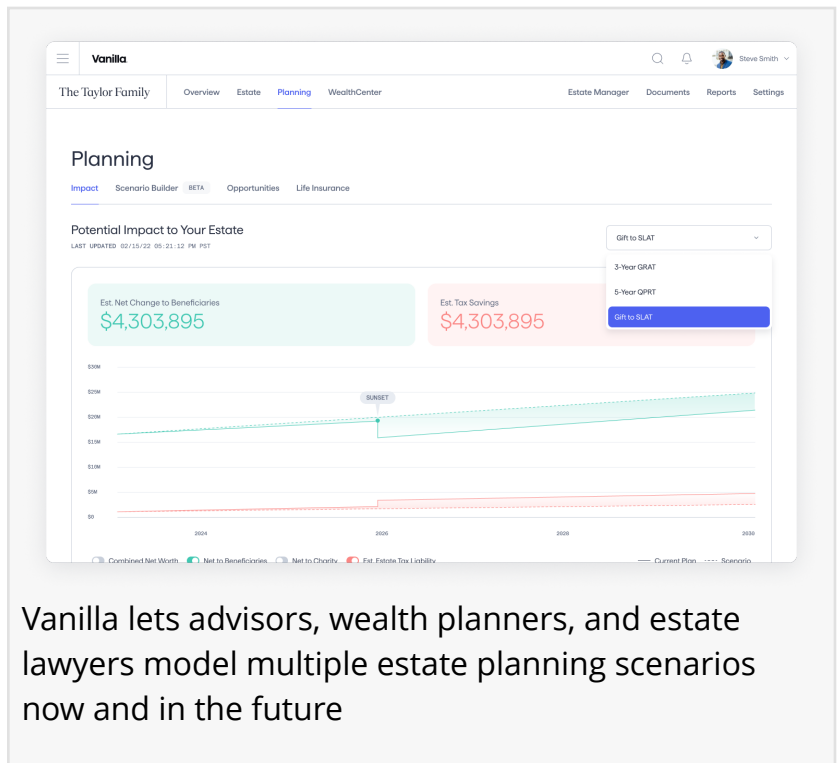
Leonard Family Foundation Michael Leonard II Separate Trust Martin Leonard Separate Trust Julia Johnson Separate Trust Leonard Family Foundation Michael Leonard Martin Leonard Julia Johnson Descendant's Trust

GST - NON-GST SHARES GST - NON-GST SHARES GST - NON-GST SHARES

Vanilla offers easy-to-understand diagrams and interactive visualizations

Management are using Vanilla to provide their advisors with technology that allows them to offer differentiated estate planning services.

"The Vanilla platform simplifies the estate planning experience for our clients and advisors, and the platform's tools and visualizations enhance our advisors' ability to provide intergenerational wealth planning," said Massy Williams, Principal and Head of Wealth Management, Vanguard. "We're excited by the many possibilities the Vanilla capabilities create for our advisors as they work to deliver best-in-class planning and outcomes for clients."



Vanilla lets advisors, wealth planners, and estate lawyers model multiple estate planning scenarios now and in the future

"Vanilla helps our advisors deliver more impactful discussions with our clients," said Chad Hamilton, Senior Vice President, at Mariner Wealth Advisors. "We're excited by the continued innovation Vanilla is announcing to help clients make better decisions about their legacies."

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*Gene Farrell, CEO, Vanilla*

Newly-introduced products available in the Vanilla Estate Advisory Platform offer advisors visualization tools, advanced planning tools, and a document creation service:

#### Vanilla Estate Builder

Vanilla Estate Builder transforms the most sophisticated estate plans into simple, easy-to-understand diagrams and interactive visualizations. Built in partnership with experts at some of the world's leading wealth management firms,

it automatically identifies key variables and applies thousands of tax and state-specific rules to generate a comprehensive client profile. It provides interactive diagrams, funding waterfalls, state and federal estate tax calculations and projections, and beneficiary reports for clients across the spectrum of wealth and complexity.

#### Vanilla Scenarios

Vanilla Scenarios gives advisors, wealth planners, and estate lawyers a powerful, dynamic platform to model multiple estate planning scenarios now and in the future to illustrate the impact of planning. Multiple scenarios — including various projections, SLATs, annual gifting, and

more — can be created, saved, and layered upon existing plans. Advisors can use Vanilla Scenarios to model against complete profiles or an outline of assets.

### Vanilla Document Builder

Vanilla Document Builder™ gives advisors the ability to offer clients on-demand estate planning documents. The powerful new estate planning document engine is currently available in public preview to Vanilla customers, enabling advisors to offer clients the ability to create revocable trust packages including power of attorney, healthcare directives, and pour-over wills. Built as an extensible document platform, Vanilla will continue to make additional planning documents available over time.

Vanilla's latest platform offerings address a growing need for advisors to embrace technology solutions that support and scale stronger client relationships. According to [research by Kitces](#), less than 20 percent of advisors have adopted a software solution for estate planning, which could be a barrier to working with technology-minded generations as billions of dollars of wealth change hands over the coming decades. Vanilla's own [State of Estate Planning report](#) recently revealed that easy-to-understand visuals were the most important factor in influencing clients to hire an estate advisor, especially among respondents with more than \$25 million in household net worth, who likely have complex estate considerations.

"Leading wealth advisors are modernizing their approach so they can deliver comprehensive estate advisory services," said Farrell. "As more clients seek out holistic services from 'total wealth advisors' we believe dynamic, visual technology like Vanilla will help advisors deepen client relationships and expand share of wallet."

For more information about the Vanilla Estate Advisory Platform, visit [justvanilla.com](http://justvanilla.com).

### About Vanilla

Vanilla is the world's first Estate Advisory Platform, purpose-built by advisors and estate professionals to help wealth management firms deliver a holistic, modern estate planning experience to their clients. With Vanilla, advisors can deliver differentiated advice, expand their client relationships, win new business, and increase their ongoing value by offering simplified, scalable estate analysis to every client. Learn more about how Vanilla is reinventing the estate planning experience, end-to-end at [www.justvanilla.com](http://www.justvanilla.com).

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