

# Vanilla Launches AI-Powered Estate Planning Assistant and Expanded Document Builder Capabilities

*New AI assistant VAI Chat helps advisors with estate planning concepts; streamlined document creation gives clients a modern estate planning experience*

The Vanilla logo, consisting of the word "Vanilla" in a bold, black, sans-serif font with a registered trademark symbol.

SALT LAKE CITY, UTAH, UNITED STATES, January 23, 2024 /EINPresswire.com/ -- Vanilla, a leading provider of [innovative estate planning software](#), today announced new additions to its platform, including VAI Chat, Collaborative Onboarding, and the expanded availability of Vanilla Document Builder™.

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Our commitment to leveraging advanced technology like AI demonstrates our dedication to providing advisors and clients with solutions that are not only sophisticated but also simple and delightful.”

*Gene Farrell, CEO, Vanilla*

VAI Chat is an AI-powered assistant designed to simplify the estate planning experience for wealth planners, advisors, and their clients. Currently in beta, VAI Chat offers an intuitive chat experience in the Vanilla platform, answering practical estate planning questions sourced from a curated corpus of estate planning content. Its capabilities extend beyond traditional support, providing real-time responses to complex queries such as, “What happens to a SLAT if a couple gets divorced?” or “What are the best ways to figure out if my client has used any of their exemption?” VAI Chat is built off of VAI™, Vanilla’s AI

engine for estate planning. Last year, Vanilla previewed how VAI can be used to transform static estate planning documents into visual diagrams inside of the Vanilla Estate Builder.

“We’re thrilled to launch these groundbreaking tools that significantly simplify the estate planning experience for clients,” said Gene Farrell, CEO, Vanilla. “Our commitment to leveraging advanced technology like AI demonstrates our dedication to providing advisors and clients with solutions that are not only sophisticated but also simple and delightful.”

Vanilla has also introduced a new Collaborative Onboarding feature, allowing advisors to partner more effectively with clients in conducting comprehensive estate reviews. Advisors can now

invite clients to initiate their estate profile, enabling a collaborative environment where clients input their information and securely upload existing documents for review and visualization. This innovative process culminates in either the advisor's planner or Vanilla transforming these documents into easy-to-understand estate visualizations.

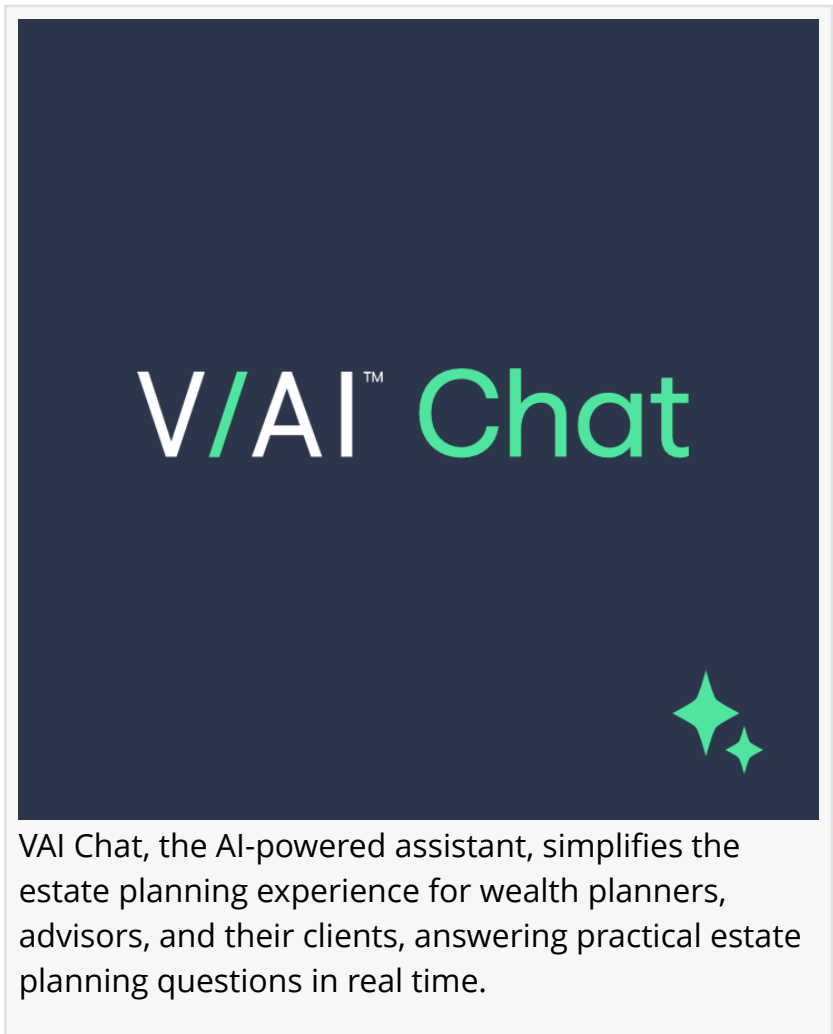
Vanilla is also pleased to announce significant enhancements to Document Builder, a modern document creation engine for estate planning, which Vanilla has now moved from public preview to general availability. In addition to letting Vanilla customers offer clients on-demand documents, Vanilla has released two additional features: For on-demand documents, advisors will be able to leverage flexible client billing options, reflecting the evolving nature of advisor business models. And for clients that want more guidance in the document creation process, Vanilla will offer the option for users to directly engage a premier law firm in the completion of their documents, available at first in limited states.

Based on document templates built for high-net-worth individuals, Vanilla Document Builder offers clients sophisticated wealth-transfer options including marital trusts, disclaimer trusts, and pot trusts. Users can build their own trust plan that includes a Revocable Trust with a Pour-Over Wills, Financial Power of Attorney, Health Care Directives (including HIPAA disclosure), and Certification of Trust.

"The ever-increasing sophistication of our modern document solutions, as well as the flexibility for different payment options, will allow advisors to deliver more value to their clients through a proactive, empowering estate planning experience that is powered by technology and simplified by intuitive design," said Farrell.

These advancements underscore Vanilla's role in modernizing estate planning, aligning with the growing need for user-friendly solutions in an evolving wealth management landscape.

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



VAI Chat, the AI-powered assistant, simplifies the estate planning experience for wealth planners, advisors, and their clients, answering practical estate planning questions in real time.

## 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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