

	Luminary Go	★ Most Popular Luminary Pro	Luminary
	Luiiiiiai y Go	Laminary I I o	Luminary Enterprise
Luminary AI - Summarize, extract, and query any trust or legal documents			
Reports - Present client-ready entity overviews, balance sheets, and more			
Calculate - Analyze the impact of GRATs, CRTs, CLTs, gifts, and more			
Permission profiles with varying levels of access for users and COI collaborators			
Dynamic estate waterfall diagrams - Customize flowcharts combining asset and entity data			
Quantify federal and state level tax value created from planning			
Illustrate hypothetical scenarios and compare current vs proposed plans			
Simulate and compare multiple outcomes with custom growth profiles			
Integrations for portfolio reporting and CRM			
Work with a customer success manager			
Custom integrations			
Open API access			





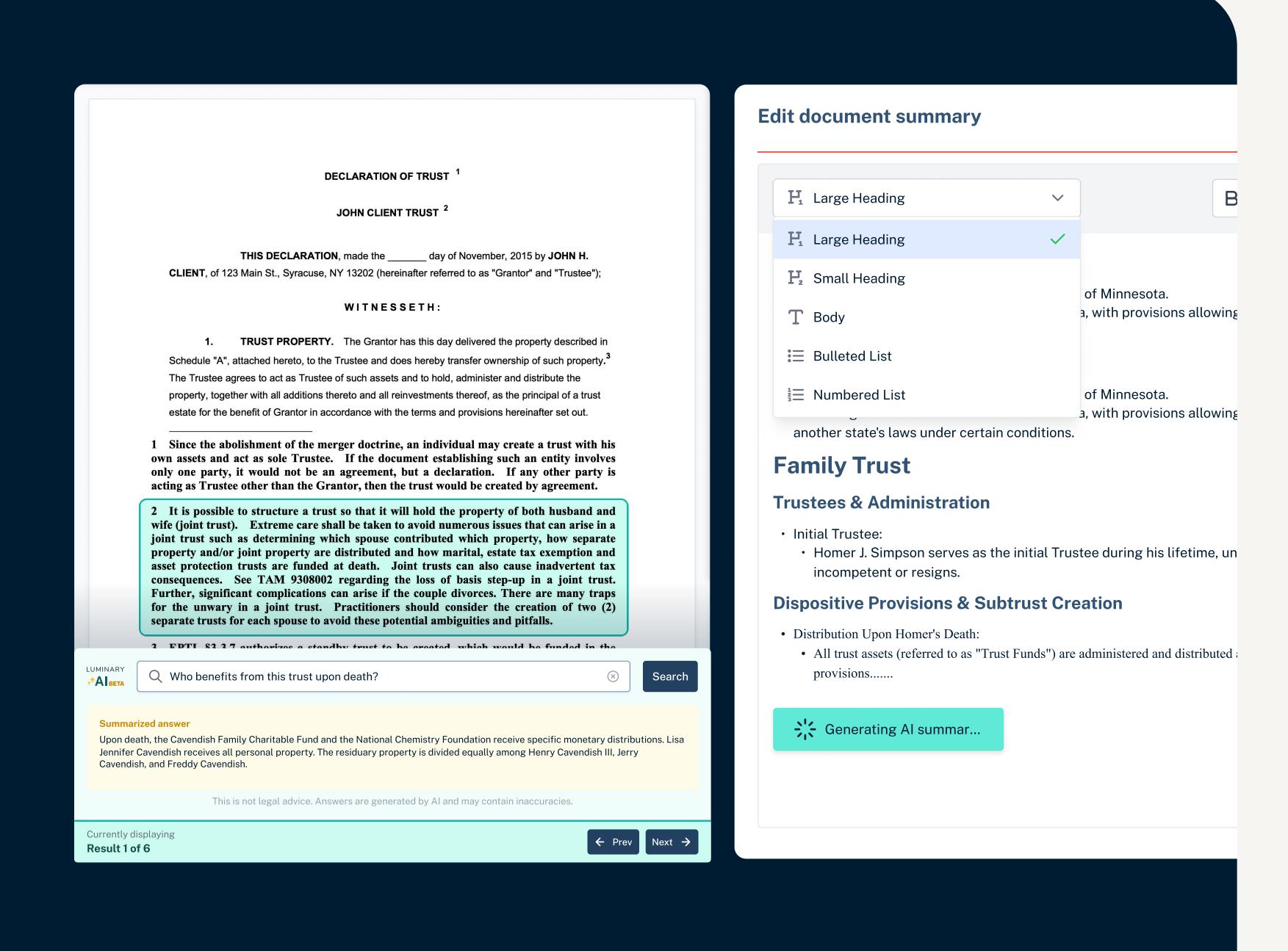


LUMINARY AI

Turn documents into information assets with AI assistance

Luminary AI extracts key information from static documents, creating new digital data records which connect to applications for analysis, visualizations, and reporting.

98% Luminary Al Accuracy Rate



Luminary is built to elevate the wealth ecosystem

Family Offices

Wealth Advisors

Professional Services

Enterprise

No matter your tier, use Luminary to...

Visualize & Present

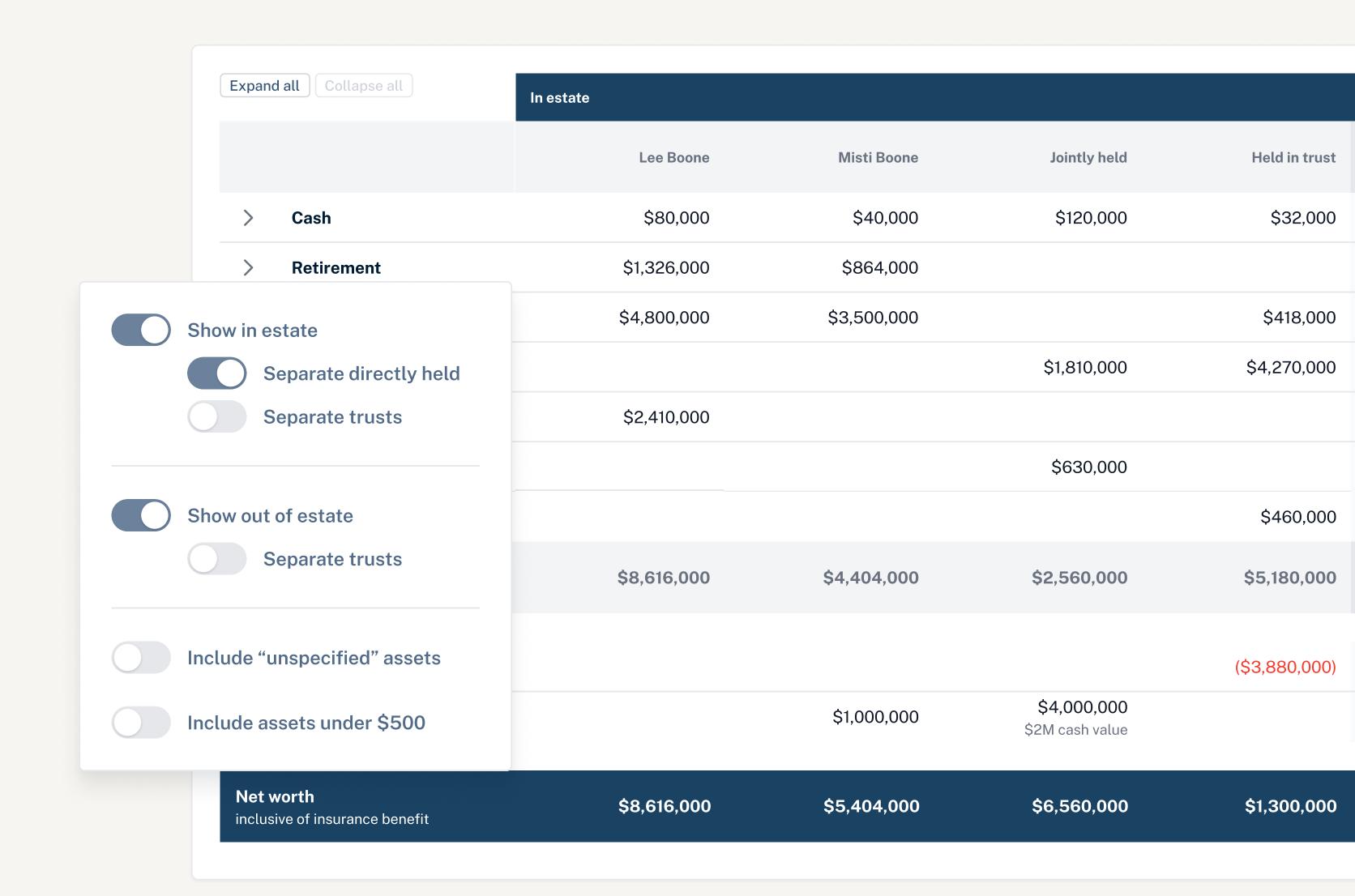
Create client-ready entity overviews, balance sheets, and more

Calculate & Report

Model the impact of proposed GRATs, CLTs, CRTs, gift, and more

Track & Assign

Manage wealth transfer tasks and notifications



Collaboration

Securely grant access to a client's legal and tax advisors to seamlessly collaborate on a single, shared data set.



Digital System of Record

Institutionalize and share knowledge across your firm, digitize and store documents, and easily reference key information in the client dashboard.