

Zero IT Administration Overhead

- EstateWorks is a hosted application - there is no software to deploy, upgrade or maintain.
- All you need is Microsoft Explorer web browser to utilize the EstateWorks system.
- The EstateWorks on-demand system grows with your needs without any migration costs.

Customization and Integration

The system is highly configurable by customers using web based administrative tools. Additional configuration beyond the scope of the administrative tools can be performed by our professional services team to meet the customers' specific needs.

EstateWorks partners with complimentary solution providers such as 706 tax system providers and securities valuation program providers. The integration utilizes EstateWorks advanced XML interface and web services. Customer specific system integration projects can be implemented using XML and web services.

Data Import and Export

EstateWorks provides application specific import or export capabilities for Appraise, CCH ProSystems, EstateVal, FASTER Systems, Fast-Tax FPS, GEMS, Lacerte, Lackner, and Outlook. The EstateWorks XML interface is available for customer specific import and export requirements.

Data Backup and Archiving

EstateWorks customer data is subject to regular back-ups. Custom schedules are also available.

Inquiries

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Secure and Reliable

- EstateWorks is architected and exhaustively tested to maximize security and reliability.
- Multiple levels of physical, hardware, and software security provide unparalleled protection for your valuable data.
- Disaster recovery plans ensure the availability of your data under all circumstances.

Physical & Network Security

EstateWorks systems are hosted by DataPipe, a leading specialist hosting provider, in a secure data center with multiple layers of physical and network security to prevent unauthorized access, including SSL-encrypted data transmission. In addition, customer access can be restricted to the IP addresses of your offices.

Application & Data Security

Each client's data is stored within its own database. Client data is never commingled.

Access to each database is controlled by a master database based on individual user authentication. Each EstateWorks user logs in using a strong password which is stored in an encrypted format. Additional client based access controls can be configured to further limit access.

Security Audit & Review

EstateWorks customers include some of the largest and most sophisticated financial institutions, who perform regular audits of our systems and processes.