LUMINARY

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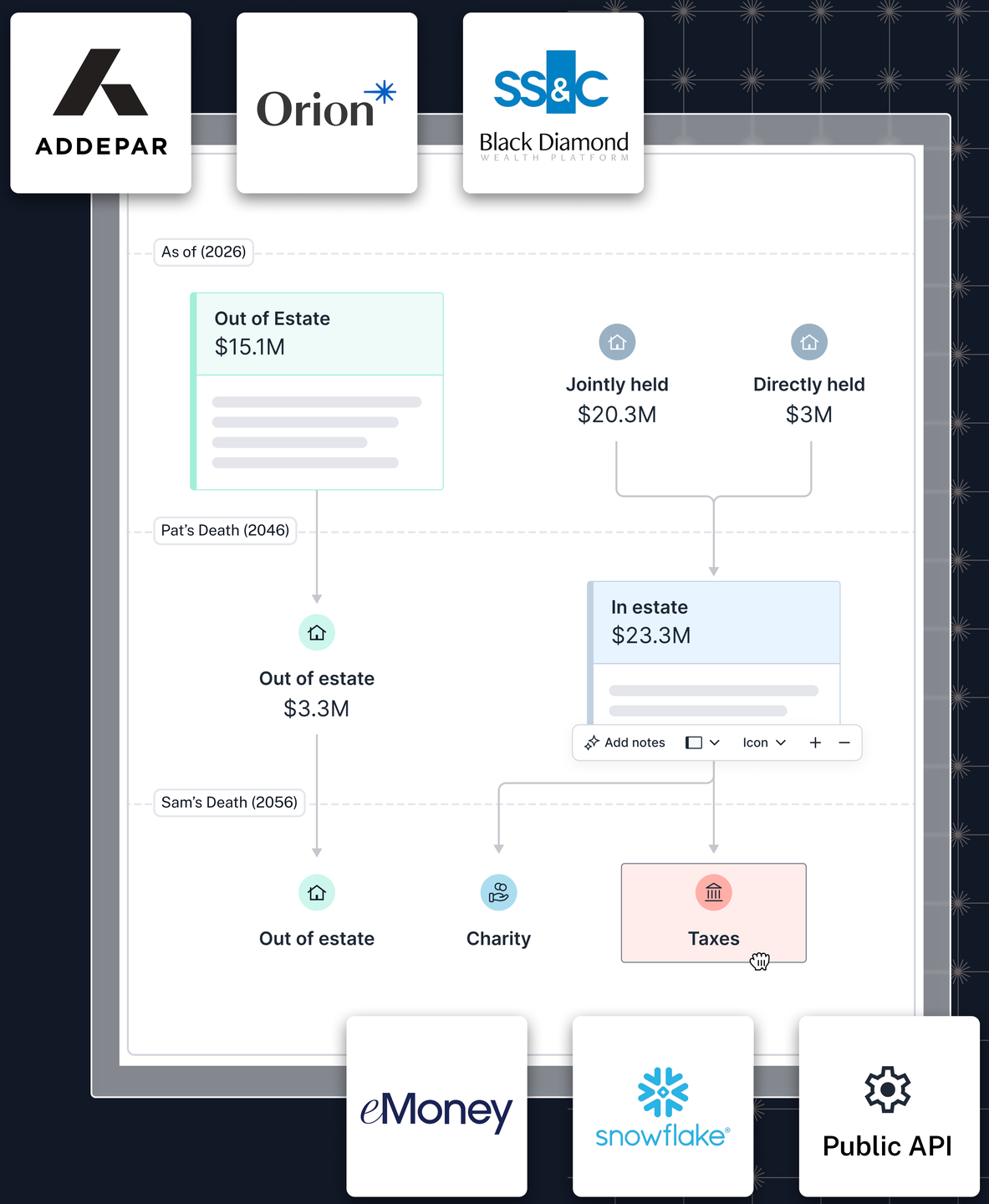
Technology Transforming Wealth Transfer

Luminary is an AI-powered wealth transfer platform. We turn static documents into dynamic data that power high impact client deliverables.

Just upload documents and let Luminary AI produce custom document summaries, editable visualizations, and surface potential issues for further review. Then model outcomes with what-if analyses and package it all in a white-labeled presentation.

Help your clients understand the value of their estate plan, differentiate your practice, and drive growth.



Book a demo with a Luminary expert today

Streamline & Collaborate

Grant access to a client's legal and tax advisors to securely collaborate on a single, shared data set.

Visualize & Present

Build customizable estate waterfalls and more to easily bring ideas to life in client-ready presentations.

Analyze & Model

Project beneficiary and estate tax outcomes, quantify tax value creation, and model new ideas.

Trusted by industry leaders

BNY · FOCUS FINANCIAL PARTNERS · Wealth Enhancement® · CARSON WEALTH · armanino · IEQ CAPITAL FAMILY OFFICE

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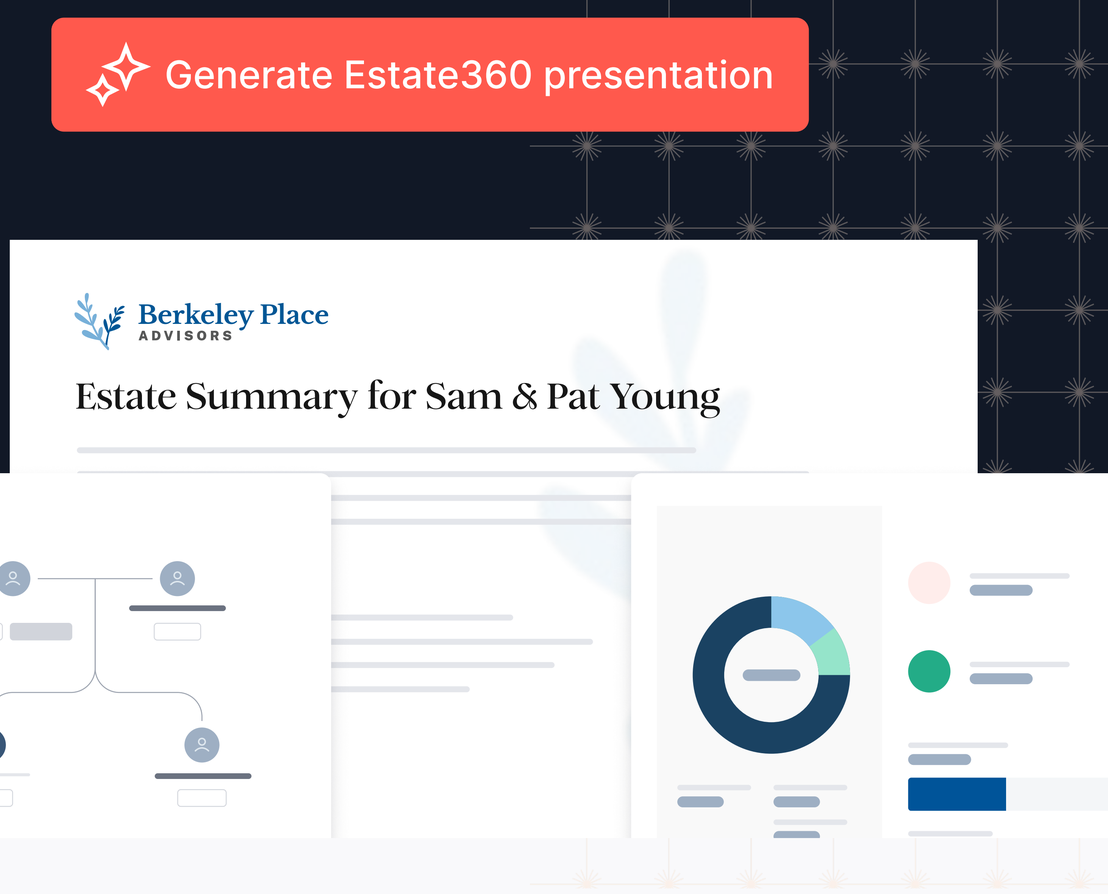
Luminary Estate360 Reporting

Turn client documents client deliverables in just minutes

Create fully automated, firm-branded estate overviews that transform client documents into a comprehensive, client-ready presentation with a single upload.

Eliminate hours of manual work and data entry, demonstrate expertise from the first meeting, and ensure firm wide consistency.



FamilyWealthReport AWARDS2026 · FOX Family Office Exchange · KITCES.com · ThinkAdvisor. LUMINARIES AWARDS 2026 · Wealth Management 2026 Industry Awards

Turn Documents Into Data. Turn Data Into Deliverables.

AI Document Intelligence — ONBOARDING · INTAKE · PROSPECTING

- Upload documents and get your arms around a client situation in minutes
- Surface insights and discussion items automatically
- Generate a client-ready report in a single click

Designed for Generalists · firm-wide enablement

Data-Powered Visualizations — SMART REVIEW · FAMILY TREE · WATERFALL

- Smart Review encodes names, dates, powers, and provisions as structured data
- Layer in balance sheet detail via integration or quick manual entry
- Power the family tree, waterfall, and visuals that simplify complex plans

Designed for Advisors · planning teams

Analysis & Reporting — SCENARIO MODELING · CUSTOM REPORTS

- Model outcomes across time and return assumptions
- Layer in hypothetical “what-if” scenarios
- Build custom reports for the client conversation

Designed for Planning experts