

8 ways Vanilla is a game-changer for trust companies

In the complex world of trust administration, there's constant pressure to quickly onboard new trusts and manage existing ones. Vanilla delivers a powerful platform tailored to the nuanced needs of trust companies and fiduciary officers. This overview outlines how Vanilla empowers these professionals to streamline operations, ensure compliance, and elevate client service through advanced document intelligence, dynamic estate visualization, and robust AI capabilities.

1 Dynamic estate diagrams and visualizations

Vanilla centralizes and digitizes complex estate planning documents, offering a unified platform to build, visualize, and analyze estate plans. Advisors benefit from full control over estate diagrams in Vanilla—from structuring entities to renaming sub-trusts, defining funding instructions, and editing provisions. The platform supports both high-level overviews and granular detail, which ensures each estate plan is tailored precisely to client needs.

What this means for you: Clients can understand documents in minutes, leading to more productive, focused conversations.

2 AI-enhanced document analysis and custom summaries

Vanilla uses advanced AI to **scan and analyze estate documents** (including wills, trusts, and POAs), automatically extracting key data and summarizing estate structures. These summaries are editable like a Word document and exportable as PDFs—saving time and reducing manual entry.

Importantly, this AI functionality is **walled off from general-purpose AI models**, protecting client data privacy and ensuring compliance with industry regulations.

Trust companies can also generate estate summaries using **custom prompts** tailored to their internal workflows or trust committee requirements. This ensures each summary is purpose-built for decision-making and compliance reviews.

What this means for you: Understand the general outline of an estate plan and generate custom summaries in moments.

3 Tailored client deliverables

Vanilla's estate diagrams are not only functional but also **client-friendly**. Advisors can leverage these intuitive visualizations to illustrate both current and proposed structures—enhancing client understanding and demonstrating strategic value.

What this means for you: Impress clients with customized, easy-to-understand visuals.

4 Connected financial data through integrations with eMoney, Addepar, and more

Vanilla integrates seamlessly with the platforms your firm is already using. For example, the eMoney integration syncs financial planning data, including **net worth, account values, and beneficiary designations**. This real-time connection ensures estate plans and financial models remain consistent—bridging the gap between planning and documentation.

For firms managing complex portfolios, Vanilla's integration with Addepar enables the import of investment account-level data and performance reporting. This enhances visibility into valuations and ownership structures across trusts and entities—critical for fiduciary accuracy and oversight.

What this means for you: See a holistic view of a client's financial picture for better, more well-rounded planning.

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5 V/AI Copilot for instant insights

Vanilla's **AI Copilot** enables fiduciary officers to ask direct questions about documents, such as: Is this a grantor or non-grantor trust? Where is the reverse QTIP election mentioned? Are we listed as trustee anywhere?

V/AI Copilot not only answers with precision but also provides **context and sourcing**, drastically reducing time spent on reviews and increasing accuracy.

What this means for you: Query planning documents and surface answers instantly with the power of AI.

6 Fiduciary summary and opportunity identification

Vanilla's **Fiduciary Summary** page offers an actionable snapshot of all trust instruments and roles. Trust officers can do things like:

- Identify missing or outdated fiduciary appointments
- Spot deceased individuals in roles that could be replaced with corporate fiduciaries
- See where their company is or isn't listed, creating opportunities for growth

What this means for you: Identify gaps or issues at a glance.

7 Advisor efficiency and scalability

With automation and digitized workflows, Vanilla enables trust companies to **scale services** without sacrificing quality. Teams can handle more clients without needing additional headcount—especially impactful for lean operations or those in growth mode.

Vanilla centralizes and digitizes complex estate planning processes, offering a unified platform to **build, visualize, and update estate plans**. This streamlined approach improves collaboration between advisors, estate attorneys, and clients—minimizing back-and-forth and enhancing alignment.

What this means for you: Create more efficient workflows and bring high-quality planning services to more clients.

8 SOC 2 compliant

Vanilla maintains a robust security and compliance posture. Vanilla undergoes an annual SOC 2 Type II audit, and has received clean reports since it began audits in 2022. We continuously meet and exceed the rigorous security and compliance requirements of our largest global financial services customers. More information can be found [here](#) and in our [Trust Center](#).

What this means for you: Provide white glove estate planning with peace of mind.

PRODUCT / TRUST COMPANY

Trust Company features

- Quickly identify relevant fiduciary language in existing trust documents
- Provide Vanilla with your Fiduciary team's custom prompts & synoptics for summaries that are required during your fiduciary review process
- Identify trust company opportunities across your client base (e.g., clients with irrevocable trusts or children serving as fiduciaries)
- Highlight your trust company as a fiduciary option during document creation to streamline appointments and increase visibility

JOHN A. JONES REVOCABLE LIVING TRUST
AMENDED AND RESTATED

THIS IS A TRUST AGREEMENT (referred to herein as this "Agreement"), between John A. Jones (referred to herein as the "First Spouse") and Hayley Williams (referred to herein as the "Second Spouse"), a married couple (collectively described herein as the "Settlers" or each individually as a "Settler") and the Settlers, as trustees (together with any additional or successor trustees named hereinafter) (collectively described herein as the "Trustees"),

WHEREAS, the Settlers and to dispose of the property transferred to the Trust, and

NOW, THEREFORE, Schedule A to the Trust, transferred to the Trustees,)

Property transferred community property with the First Spouse or the Second Spouse or the property or community property character of the property. If the Second Spouse as separate property, the Settlers' community property. In the absence of a designation, the Trustees shall treat any property transferred as community property until notified otherwise.

1

Custom Summary

Choose Custom Method

☒ Enhance Vanilla Summary
Add specific instructions while keeping Vanilla's base prompt intelligence

Visualization Preference
Visualization styles may vary from preferences. **TABLE** **DIAGRAM**

☐ Create Your Own Summary
Create entirely new prompts that replace Vanilla's defaults

Add Custom Instructions

Show me who is eligible to serve as trustee

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Vanilla

CONFIDENTIAL

Vanilla equips trust companies with a modern, intelligent platform that **simplifies estate planning, enhances collaboration, and drives operational efficiency**. From AI-powered document insights to customizable diagrams and seamless integrations, Vanilla is purpose-built to meet the unique needs of fiduciaries—and scale with them into the future.