



Security Software Exceptions for running Lackner's 6-in-1 and InheriTax

The following summarizes the footprint of the FileMaker platform as used to deploy Lackner's 6-in-1 Estate Administration System and InheriTax. It includes some exceptions and considerations for aligning security (anti-virus, firewall, etc.) software with the environment.

Security Justification

The FileMaker platform requires specific file system and process access in order to function correctly in both standalone and multi-user environments. Security software such as antivirus, endpoint detection and response (EDR), and host-based firewalls can interfere with normal FileMaker operations if not properly configured.

The recommended exceptions in this document are intentionally scoped to:

- Known application directories and data locations
- Required service processes
- Necessary communication ports

These exceptions are limited in scope and are not intended to broadly reduce system protections.

Without these exclusions, common issues may include:

- Database file corruption due to file-locking or scanning interference
- Performance degradation during database access, scripting, or backups
- Blocked or delayed network communication between FileMaker Pro and FileMaker Server
- **Interruption of update mechanisms and plugin functionality**

To maintain a strong security posture:

- Only the minimum required paths, processes, and ports are excluded
- Unused services (such as ODBC/JDBC) remain disabled and blocked
- Standard security controls (patching, access control, logging, and monitoring) remain in effect
- All changes should be validated and monitored through normal IT security processes



These practices align with common enterprise guidance for running database-driven applications in secured environments, balancing operational reliability with appropriate risk management.

FileMaker Pro (FMP) (6-in-1, InheriTax)

FileMaker Pro is the client-side application that 6-in-1 runs on for both standalone and multi-user deployments. It is installed in the user's desktop environment to run 6-in-1, and in the server/admin environment for maintenance purposes. In standalone deployments, FMP *directly* opens the collection of ~123 **.fmp12** files which make up 6-in-1. With multi-user deployments, FMP opens 6-in-1 files hosted on the server (FMS).

These are the primary locations to be aware of for which we recommend adding exceptions if any questions arise:

Windows

Root Platform Folder (Preferred):

C:\Program Files\FileMaker*.* (and ALL sub-directories)

FMP-Specific Application Folder (if root isn't specified already):

C:\Program Files\FileMaker\FileMaker Pro*.* (and ALL sub-directories)

Application EXE:

C:\Program Files\FileMaker\FileMaker Pro\FileMaker Pro.exe

Local User Temp Files:

C:\Users\%USERNAME%\AppData\Local\FileMaker*.* (and ALL sub-directories)



macOS

Application:

/Macintosh HD/Applications/FileMaker Pro.app

Local User Temp Files:

/Macintosh HD/Users/%USERNAME%/Library/Application
Support/FileMaker/*.* (and ALL sub-directories)

Shared Environment Files:

/Macintosh HD/Users/Shared/FileMaker/*.* (and ALL sub-directories)

FileMaker Server (FMS) (6-in-1 multi-user)

FileMaker Server is installed on a Windows or macOS server for hosting multi-user deployments of 6-in-1. It hosts all ~123 .fmp12 files which make up 6-in-1.

These are the primary locations to be aware of for which we recommend adding exceptions if any questions arise:

Windows

Root Platform Folder (Preferred):

C:\Program Files\FileMaker*.* (and ALL sub-directories)

FMS-Specific Service Application Folder (if root isn't specified already):

C:\Program Files\FileMaker\FileMaker Server\Database Server*.*
(and ALL sub-directories)

Primary Service EXE:

C:\Program Files\FileMaker\FileMaker Server\Database
Server\fmserver.exe



macOS

Root Platform Folder (Preferred):

`/Macintosh HD/Library/FileMaker Server/*.*` (and ALL sub-directories)

FMS-Specific Service Application Folder (if root isn't specified already):

`/Macintosh HD/Library/FileMaker Server/Database Server/*.*` (and ALL sub-directories)

Primary Service app:

`/Macintosh HD/Library/FileMaker Server/Database Server/bin/fmserver`

Plug-ins (6-in-1, InheriTax)

Plugins extend functionality of an application. We use 3 plugins for FMP, and 1 plugin for FMS. These plugins help us manage REST API calls, file management, contextual menus, and more. The plugins are installed and periodically updated by Lackner Connect (see below) and are stored within user AppData:

FMP Plugins: (6-in-1, InheriTax)

[Windows] `C:\Users\%USERNAME%\AppData\Local\FileMaker\FileMaker Pro\2X.0\Extensions\*.*` (and ALL sub-directories)

[macOS] `/Macintosh HD/Users/%USERNAME%/Library/Application Support/FileMaker/FileMaker Pro/2X.0/Extensions/*.*` (and ALL sub-directories)

FMS Plugins: (6-in-1 multi-user)

[Windows] `C:\Program Files\FileMaker\FileMaker Server\Database Server\Extensions\*.*` (and ALL sub-directories)

[macOS] `/Macintosh HD/Library/FileMaker Server/Database Server/Extensions/*.*` (and ALL sub-directories)



Lackner Software Launcher (Launcher): (Windows only)

Lackner Software Launcher is a Windows-only helper app that, upon initial launch for setup, configures registry and other settings needed for 6-in-1. After setup has been completed, a shortcut icon is placed on the desktop to serve as the primary entry point for users in the desktop environment to launch FMP and provide a progress bar while FMP is launching. (FMP can be notoriously slow to launch and show UI, so this progress bar helps the user know that 'something is happening'.)

These are the primary locations to be aware of for which we recommend adding exceptions if any questions arise:

Root Platform Folder (Preferred):

`C:\Program Files\FileMaker\*.*` (and ALL sub-directories)

Application Folder (if root isn't specified already):

`C:\Program Files\FileMaker\Lackner Software\*.*` (and ALL sub-directories)

Application EXE:

`C:\Program Files\FileMaker\Lackner
Software\LacknerSoftwareLauncher.exe`

Local User Temp Files:

`C:\Users\%USERNAME%\AppData\Local\Lackner Software\*.*` (and ALL sub-directories)



Lackner Connect (LC) (6-in-1, InheriTax)

Lackner Connect is an FMP based application (Lackner Connect.fmp12) which manages connections to 6-in-1 and other Lackner Software (esp. InheriTax), and manages updates to those products. It also installs and updates FileMaker Plugins as needed. Most users only see LC briefly as it sets up the environment and then launches 6-in-1 or InheriTax. Some users use more than one 6-in-1 or InheriTax databases. In these cases, LC presents a UI to the user to choose which database they want to open. When Launcher first is used in a respective user's profile, a copy of 'Lackner Connect.fmp12' is installed to the user's AppData folder. Since Lackner Connect manages updates for 6-in-1, there can be a lot of file activity inside its root folder, so it's important that antivirus leave it alone. Please put in an exception for the entire folder if there is any question:

Working Folder:

[Windows] C:\Users\%USERNAME%\AppData\Local\Lackner Software\
[macOS] /Macintosh HD/Users/%USERNAME%/Library/Application
Support/Lackner Software/*.* (and ALL sub-directories)

Application File:

[Windows] C:\Users\%USERNAME%\AppData\Local\Lackner Software\Lackner
Connect.fmp12
[macOS] /Macintosh HD/Users/%USERNAME%/Library/Application
Support/Lackner Software/Lackner Connect.fmp12

6-in-1 Data Files

1. **Standalone:** The default location for 6-in-1 data files in a standalone desktop environment is:

[Windows] C:\Estate20\
[macOS] /Macintosh HD/Users/%USERNAME%/Estate20/

It's precise name/location is configured in Lackner Connect (LC). The exact name of this folder (Estate20, Estate19, etc.) is not important as long as it is configured correctly in LC. Users with more than one database will necessarily have different names or locations. ***There must be no interference from antivirus in this folder or sub-directories.***

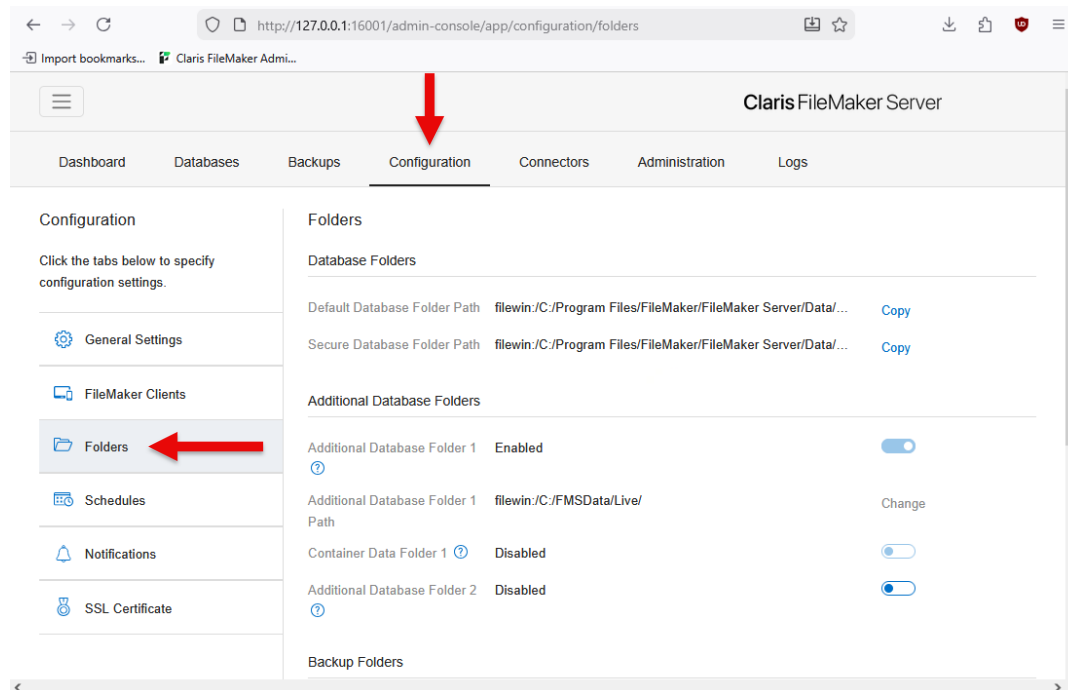
Server: The default location for 6-in-1 data files hosted by FMS is:

[Windows] C:\Program Files\FileMaker\FileMaker

Server\Data\Databases\Estate20\

[macOS] /Macintosh HD/Library/FileMaker Server/Data/Estate20/

Like the standalone data folders, the exact name is not important and can vary as long as it is correctly placed inside the default or otherwise configured database folder. These folders can be identified and configured in the browser-based Admin Console (localhost:16001):



NOTE: Default installations do not use 'Additional Database Folders'. They are configured when IT wants the data stored in a separate location. Both live data and backup data locations can be customized here. ***BOTH live and backup data folders and all sub-directories should be given exceptions in antivirus software.***



Domain White-List

The following domains should be white-listed to allow REST requests to be made over HTTPS:

- *.lacknergroup.com
- *.fms.lacknergroup.com (InheriTax users)
- *.lacknersoftware.cloud

If wild-card exceptions aren't allowed, these are the current domain names in use:

- lgitools.lacknergroup.com
- lgitools.lacknersoftware.cloud
- mefapi.lacknergroup.com
- mefservices.lacknersoftware.cloud
- mefservices.lacknergroup.com

These URLs are used for e-file operations, to retrieve Metadata like AFR updates, and for software update and license synchronizations.

Communication Ports

FileMaker Server needs the following ports to allow traffic:

- 443 (for REST calls between client and server)
- 4443, 8443 (alternatives to 443 on Windows Server when IIS is being used by other services)
- 5003 (primary connection between FMP and FMS)
- 16000, 16001 (FMS admin console, although this is usually only accessed from the server directly)

ODBC/JDBC (xDBC) Services

The FileMaker xDBC interface is not used in this deployment. Port 2399 should remain closed and no external SQL access is permitted.