Manage Complexity
Increase Productivity

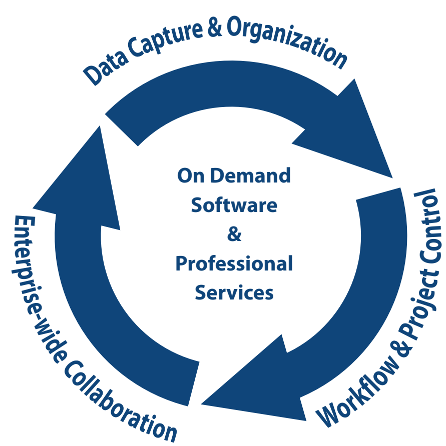
EstateWorks is the only on-demand workflow solution custom-tailored for the Trust and Estates business.

Prior to EstateWorks, professionals addressed the complexities of estate planning and estate administration with a myriad of home-grown solutions including a combination of paper, spreadsheets, and software, none of which is integrated. The result is redundant, tedious data entry and manual processes, which are inefficient and prone to costly errors.

With EstateWorks, professionals are able to streamline their estate planning and settlement work, eliminating redundant, inefficient, manual processes.

Why EstateWorks?

Using EstateWorks, law firms and financial institutions are able to measure their return on investment in just a few months as a result of increased employee efficiency, improved client service, auditable compliance to regulations and best practices, and extensive management reporting and controls.



Learn why many of the nations most established law firms and financial institutions count on EstateWorks to manage their Trust and Estates business!

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TruePlan &
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Serving Law Firms and Financial Institutions

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EstateWorks is the industry leader in enterprise-wide management solutions for estate planning & estate administration. Our on-demand solutions and professional services provide comprehensive data management, team collaboration, task management, activity tracking and alerting, automated document & letter drafting and management reporting.

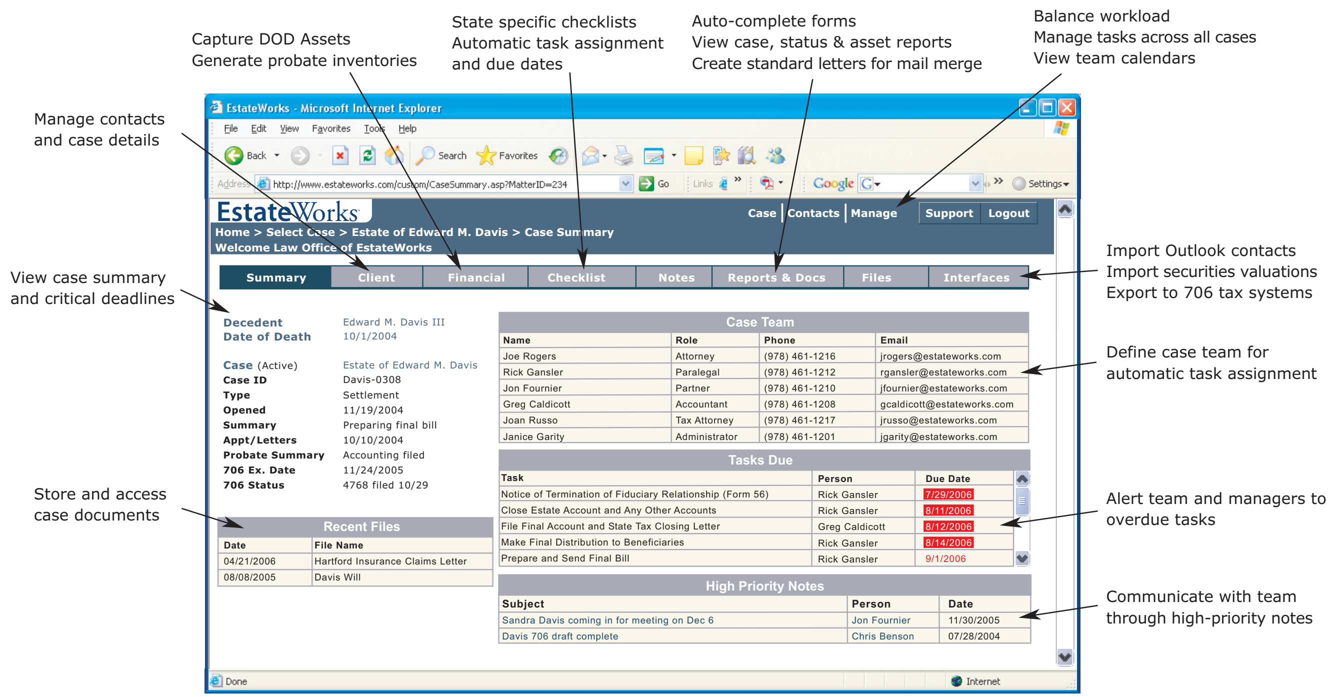
TruePlan

TruePlan enables T&E practices to generate more revenue, improve client communications, reduce expenses and protect against liability risk.

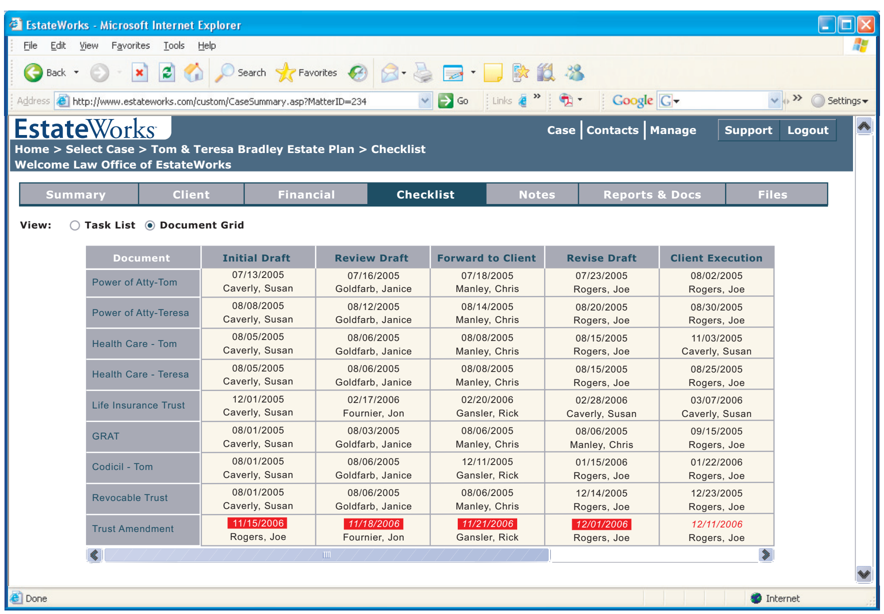
TrueSettlement

TrueSettlement enables estate administration professionals to decrease expenses, improve productivity, reduce errors and ensure compliance.

Estate Settlement — Case Summary



Estate Planning — Document Tracking



TruePlan - Features

- Comprehensive client & case management
- Instrument drafting and execution tracking
- Automated task assignments & alerts
- Integration with HotDocs® document assembly
- Automated Crummey notices & client letters
- Searchable plan details & provisions for easy notification and update when tax or regulatory changes occur
- Client gift tracking for 709 preparation

TrueSettlement - Features

- Secure, centralized, electronic data repository for estate information
- Customizable state specific settlement checklists
- Automatic task assignments triggered by key dates & events
- Team-based calendar views of estate administration tasks
- Automated probate form generation and letter creation
- Probate inventory of estate assets
- Management status reports for deadline monitoring and workload allocation
- Integration with securities valuation systems
- Integration with 706 estate tax and probate accounting systems

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