

Manage Complexity Increase Productivity

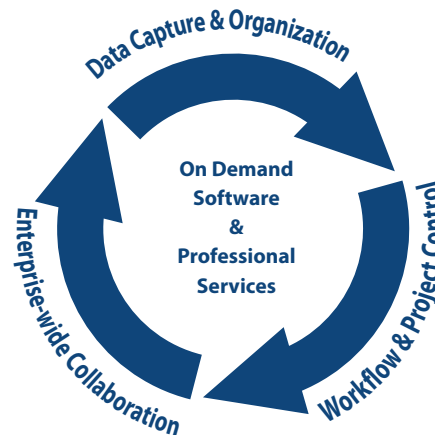
EstateWorks is the only on-demand workflow solution custom-tailored for the Trust and Estates business.

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!

sales@estateworks.com

(617) 600 - 6830

EstateWorks[™]
Plan Tracking and Settlement Solutions

EstateWorks[™]
Plan Tracking and Settlement Solutions

*Technology-enabled workflow,
collaboration, and task management
that delivers...*

**TruePlan &
TrueSettlement**

410 Boston Post Road | Suite 22 | Sudbury, MA 01776
www.estateworks.com

Serving Law Firms and Financial Institutions

EstateWorks™

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

Callouts for Estate Settlement Case Summary:

- Capture DOD Assets
Generate probate inventories
- State specific checklists
Automatic task assignment and due dates
- Auto-complete forms
View case, status & asset reports
Create standard letters for mail merge
- Balance workload
Manage tasks across all cases
View team calendars
- Manage contacts and case details
- View case summary and critical deadlines
- Store and access case documents
- Import Outlook contacts
Import securities valuations
Export to 706 tax systems
- Define case team for automatic task assignment
- Alert team and managers to overdue tasks
- Communicate with team through high-priority notes

Estate Planning — Document Tracking

Document	Initial Draft	Review Draft	Forward to Client	Revise Draft	Client Execution
Power of Atty-Tom	07/13/2005 Caverly, Susan	07/16/2005 Goldfarb, Janice	07/18/2005 Manley, Chris	07/23/2005 Rogers, Joe	08/02/2005 Rogers, Joe
Power of Atty-Teresa	08/08/2005 Caverly, Susan	08/12/2005 Goldfarb, Janice	08/14/2005 Manley, Chris	08/20/2005 Rogers, Joe	08/30/2005 Rogers, Joe
Health Care - Tom	08/05/2005 Caverly, Susan	08/06/2005 Goldfarb, Janice	08/08/2005 Manley, Chris	08/15/2005 Rogers, Joe	11/03/2005 Caverly, Susan
Health Care - Teresa	08/05/2005 Caverly, Susan	08/06/2005 Goldfarb, Janice	08/08/2005 Manley, Chris	08/15/2005 Rogers, Joe	08/25/2005 Rogers, Joe
Life Insurance Trust	12/01/2005 Caverly, Susan	02/17/2006 Fournier, Jon	02/20/2006 Gansler, Rick	02/28/2006 Caverly, Susan	03/07/2006 Caverly, Susan
GRAT	08/01/2005 Caverly, Susan	08/03/2005 Goldfarb, Janice	08/06/2005 Manley, Chris	08/06/2005 Manley, Chris	09/15/2005 Rogers, Joe
Codicil - Tom	08/01/2005 Caverly, Susan	08/06/2005 Goldfarb, Janice	12/11/2005 Gansler, Rick	01/15/2006 Rogers, Joe	01/22/2006 Rogers, Joe
Revocable Trust	08/01/2005 Caverly, Susan	08/06/2005 Goldfarb, Janice	08/06/2005 Manley, Chris	12/14/2005 Rogers, Joe	12/23/2005 Rogers, Joe
Trust Amendment	11/15/2006 Rogers, Joe	11/18/2006 Fournier, Jon	11/21/2006 Gansler, Rick	12/01/2006 Rogers, Joe	12/11/2006 Rogers, Joe

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