BANKRUPTCY
Practice Area Template
for Time Matters®/Total Practice Advantage®

By

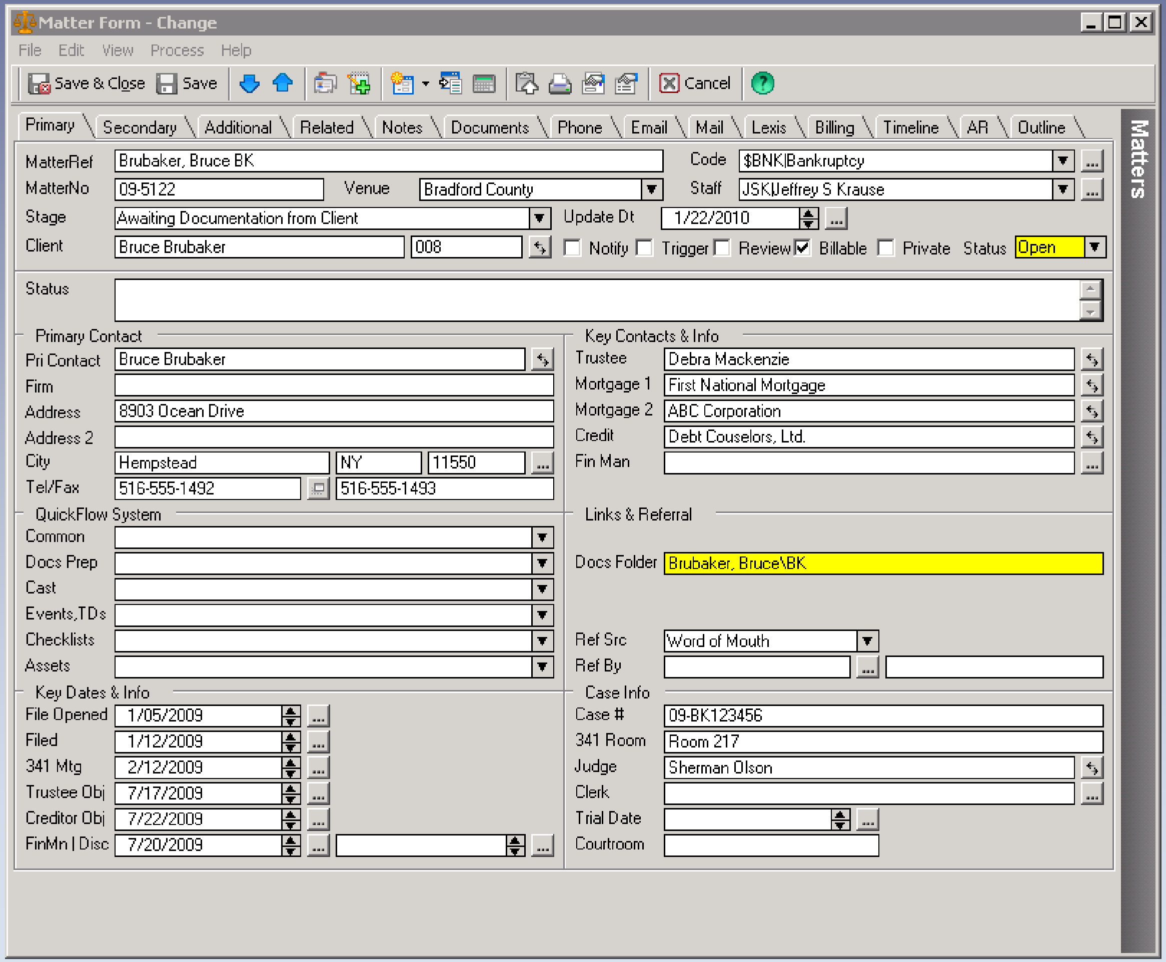
IP ASSOCIATES, LLC

Why do ***you*** need a Practice Template?

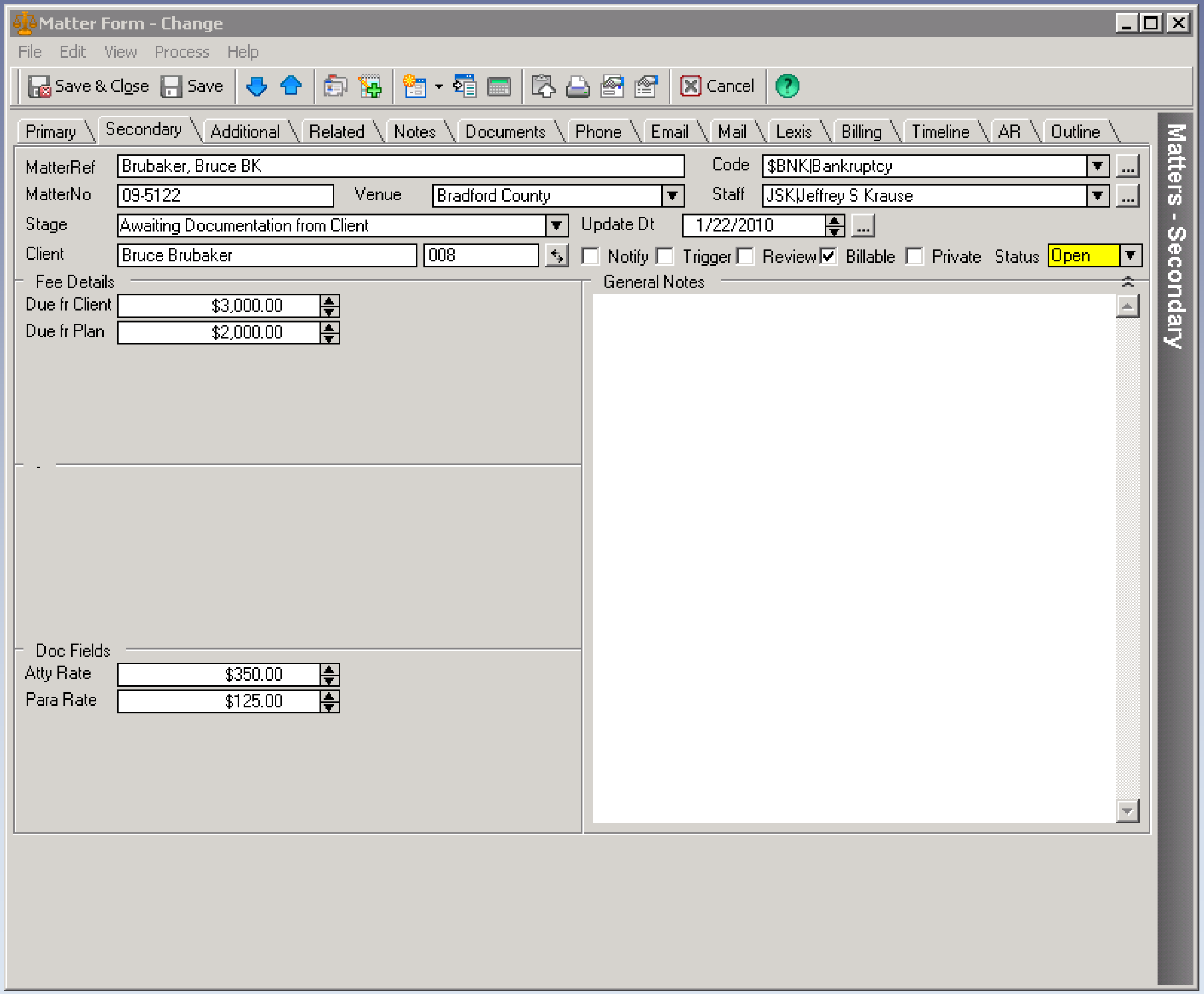
- *Tired of using the one size fits all setup that shipped with Time Matters?*
- *Frustrated that Time Matters isn't as easy to use as you expected?*
- *Concerned that a custom-tailored Time Matters configuration is too expensive and/or time consuming?*
- *Too busy practicing law to worry about designing and customizing software?*

Bankruptcy Primary Tab

The Primary tab contains most of the key information about the case. Easily keep track of the current stage of the case, key contacts related to the case via single-click lookups, key dates, referral source, and court information.



Bankruptcy Secondary Tab

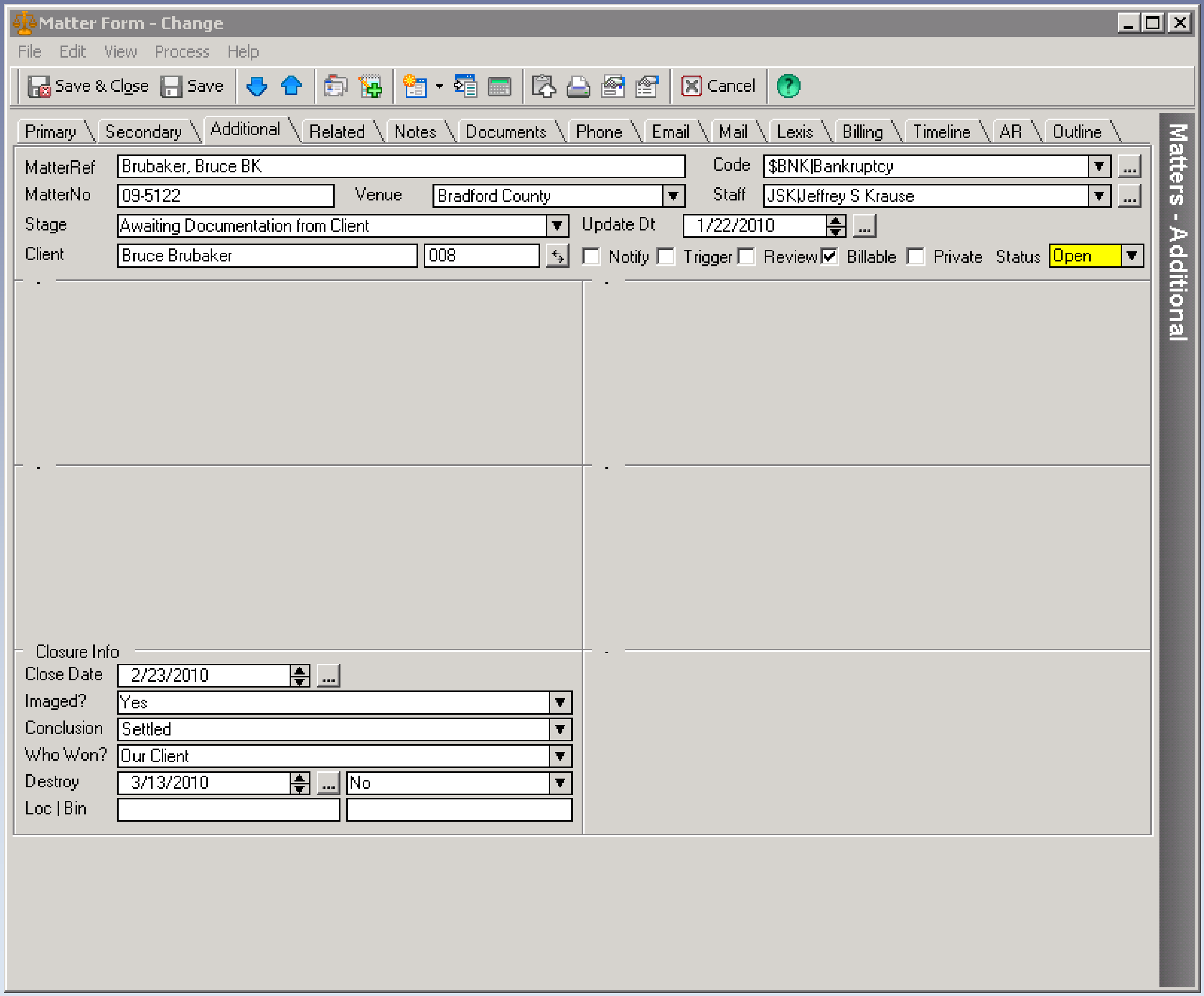


The Secondary tab leaves you plenty of room to add your own fields and includes a large free form General Notes field to input the details of the case giving rise to the case, a strategy for winning the case, or any other important details. You can also keep track of Fee Details and Attorney and Paralegal rates.

Bankruptcy Additional Tab

The Additional tab contains plenty of space to add your own unique fields.

The case closure area provides key reporting data and storage info for easy retrieval of paper files in the future.



Critical Information At A Glance

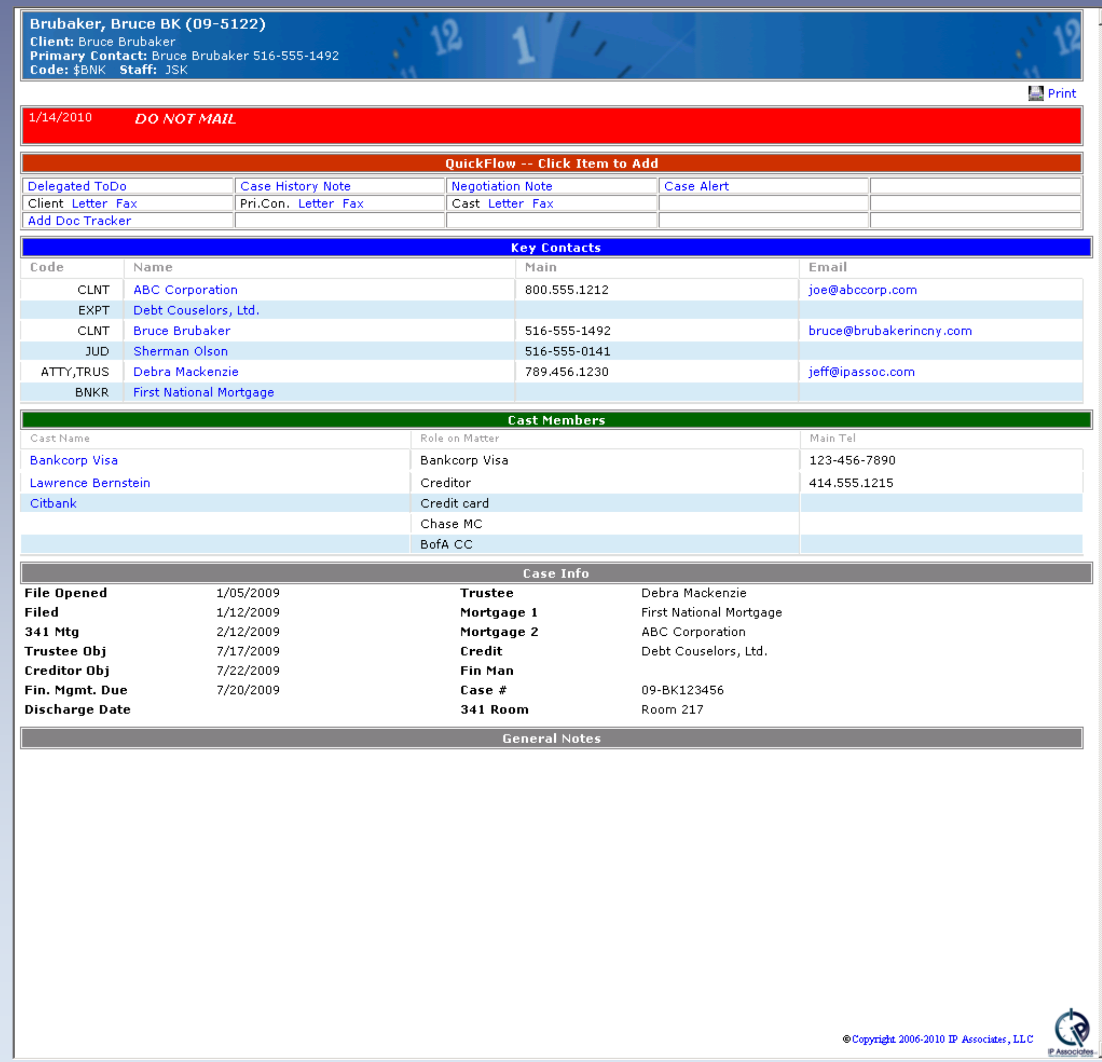
- Tired of looking in too many places for your critical case information?
  - IP Associates unique Power Views look inside the Case for you and pull out the most critical information in one easy to understand view
  - Get quick access to all case documents, tasks that are yet to be completed, negotiations with the other side, and more – it’s easy to stay on top of each case as it progresses!
  - Nearly two dozen custom Power Views are included with the Bankruptcy Practice Area Template

Bankruptcy Case Synopsis

The Bankruptcy Case Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts are displayed along with easy links back to the full Contact record. Key case data is only a click away!

Looking for a phone number? It's here.

Need to send an email? Just click on the email link on the Power View.



Brubaker, Bruce BK (09-5122)
Client: Bruce Brubaker
Primary Contact: Bruce Brubaker 516-555-1492
Code: $BNK **Staff:** JSK

Print

1/14/2010 DO NOT MAIL

QuickFlow -- Click Item to Add

Delegated ToDo	Case History Note	Negotiation Note	Case Alert	
Client Letter Fax	Pri.Con. Letter Fax	Cast Letter Fax		
Add Doc Tracker				

Key Contacts

Code	Name	Main	Email
CLNT	ABC Corporation	800.555.1212	joe@abccorp.com
EXPT	Debt Couselors, Ltd.		
CLNT	Bruce Brubaker	516-555-1492	bruce@brubakerincny.com
JUD	Sherman Olson	516-555-0141	
ATTY,TRUS	Debra Mackenzie	789.456.1230	jeff@ipassoc.com
BNKR	First National Mortgage		

Cast Members

Cast Name	Role on Matter	Main Tel
Bankcorp Visa	Bankcorp Visa	123-456-7890
Lawrence Bernstein	Creditor	414.555.1215
Citbank	Credit card	
	Chase MC	
	BofA CC	

Case Info

File Opened	1/05/2009	**Trustee**	Debra Mackenzie
Filed	1/12/2009	**Mortgage 1**	First National Mortgage
341 Mtg	2/12/2009	**Mortgage 2**	ABC Corporation
Trustee Obj	7/17/2009	**Credit**	Debt Couselors, Ltd.
Creditor Obj	7/22/2009	**Fin Man**	
Fin. Mgmt. Due	7/20/2009	**Case #**	09-BK123456
Discharge Date		**341 Room**	Room 217

General Notes

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Additional Power Views

Other Power Views that greatly increase productivity for a Bankruptcy practice are:

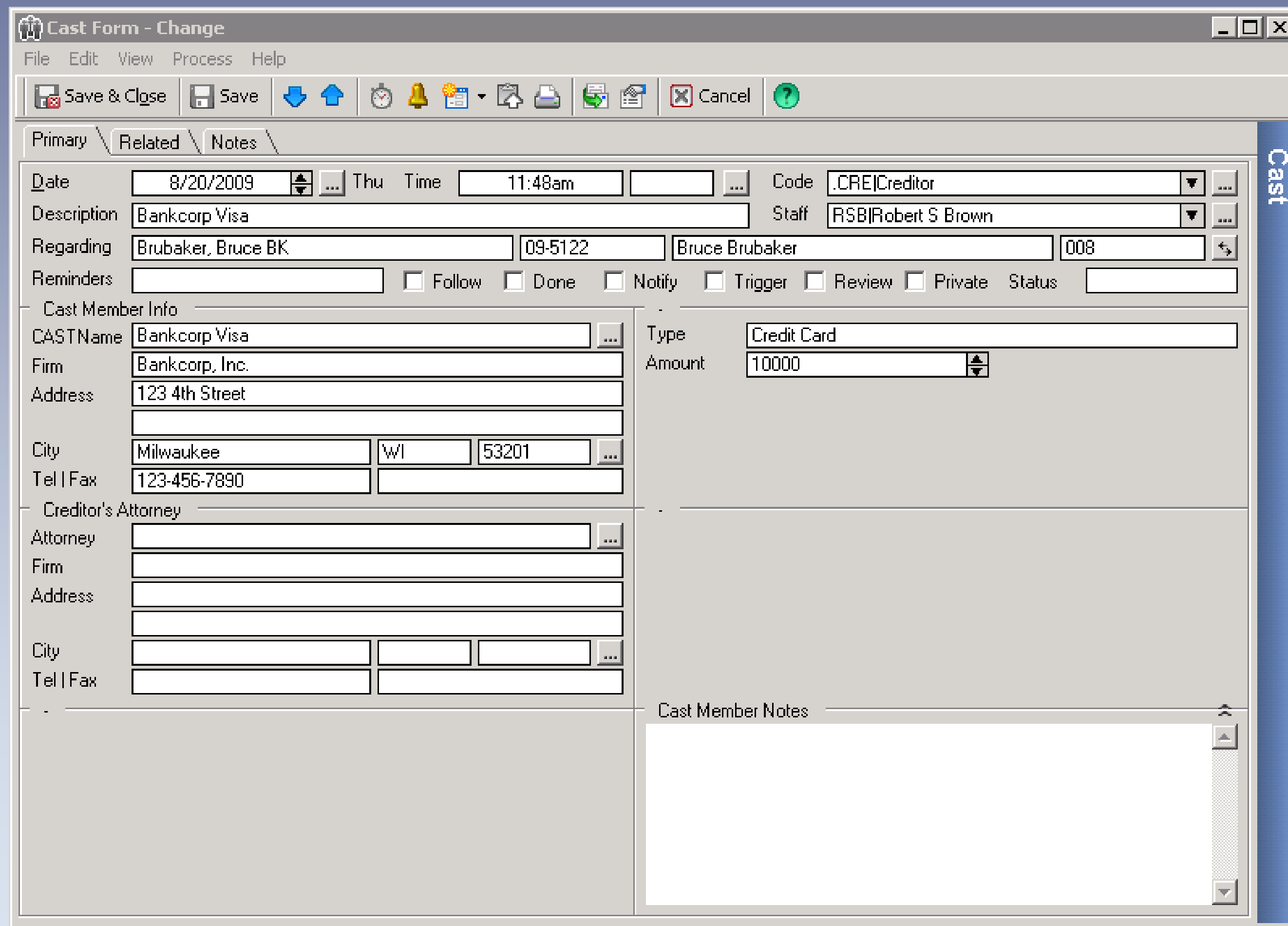
- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include evidentiary photos, scanned pleadings, deposition transcripts – anything that can be saved as a file!
- Docs Due Back: View a list of any documents for which you expect a response but have not been answered
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!
- Negotiations Summary: See every negotiation phone call and get a complete picture of the offers and demands to date.

Cast Members

- Having trouble keeping track of everyone involved in the case?
  - Cast Member records provide a place to record each person’s role in a case
  - Ever need to see how a judge ruled in previous cases you’ve had? Cast records allow you to track and find this easily!
  - Want to see how many times you’ve used an expert witness and what their opinions were on previous cases? Again, Cast records to the rescue!

“Creditor” Cast Member

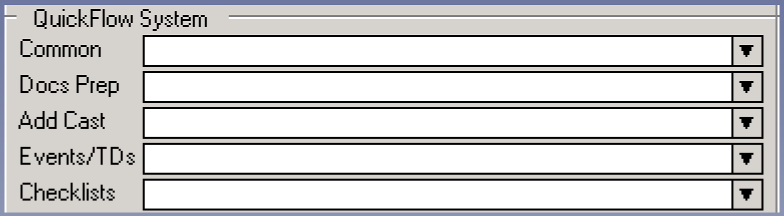
This Creditor record is an example of Cast Member. It tracks this creditor’s unique relationship to this case. It tracks what type of creditor and how much they know. Any of this can be customized to meet your firm’s needs.



Workflow & Automation

- Too many clicks and too much typing to perform one simple task?
  - Our QuickFlow System provides quick and easy access to commonly performed tasks, like creation of letters, delegating ToDos, adding Cast Members, and creating checklists – all in one easy-to-access place!
  - QuickFlow creates records in seconds, not minutes.
  - Less typing = More production
  - Automation = Consistency & speed

QuickFlow System



The QuickFlow System Area provides access to commonly performed, often repetitious, functions. With QuickFlow, they are performed faster, with fewer clicks and with less typing.

The Bankruptcy QuickFlow does all of the following, and more:

Common – Performs common functions like delegating a ToDo, adding a negotiation phone call, and creating standard letters and faxes.

Docs Prep – Draft a variety of useful documents such as a letter to opposing counsel. Your own templates are easily added to the list.

Cast – Add Cast Members records to the case such as Creditors, Attorneys, etc.

Common Features of IP Associates' Templates

Every Practice Template includes a number of standard features, including:

- Document management, tracking and auto-naming system
- ToDo Delegation system
- Over two dozen custom Power Views
- Quick Tabs that aid in filtering and tracking of records
- A common look and feel to the matter/case forms
- The QuickFlow System for automation of common tasks

To see a discussion of all the common features to our templates, please browse to the "Common Features to Our Templates" PDF on our site, or visit www.ipassoc.com/commonfeatures.htm. These features are key components and significantly enhance the usefulness of our templates.

Pricing

- Pricing is based on the number of TM/PA user licenses
- Licensing one-to-one with TM/PA users
- $400 for the 1st TM user license
- $75 for each additional user license
- Multiple template purchases provide discounts on each additional template; *Example, if 5 Practice Areas with 10 TM licenses $2,000 for 1st user (5 x $400) + $75 x 9 additional users = $2,675.00*

How To Order

- Through your local Certified Independent Consultant (CIC)
- Online at www.ipassoc.com/domesticorder.htm
- If ordering more than one template, go to www.ipassoc.com/practicetemplatesorder.htm
- Call 888-732-9071
- Download order form and fax to 866-258-9062

FOR MORE INFORMATION

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