

**BUSINESS FORMATIONS LAW
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?*

BUSINESS FORMATIONS FORM

Primary Tab

The Primary tab contains most of the key information about the matter. Easily keep track of the current stage of the matter, entity information, key dates such as formation date and fiscal year, and referral source.

The screenshot shows the 'Matter Form - Change' window with the 'Primary' tab selected. The form is organized into several sections:

- Primary/Secondary/Additional/Custom/Related/Notes/Documents/Phone/Email/Mail/Lexis/Billing/Timeline:** A set of tabs at the top of the form area.
- Matter Information:** MatterRef (ABC Corp "S" Corp Formation), MatterNo (07-1234), Bus Type (S Corp), Code (\$BUFI Bus Form'n), Staff (RSB|Robert S Brown).
- Client Information:** Client (ABC Corporation), Notify, Trigger, Review (checked), Billable, Private, Status (Open).
- Primary/Billing Cont:** Pri Contact (Therellus Baxter), Firm (Fuquay-Varina Contractors), Address (6547 Lakebend), City (Fuquay-Varina, NC, 27518), Tel/Fax (919-555-7455, 919-555-6548).
- New Entity Info:** Entity Name (ABC Corporation), Address (5002 Mesa Court), City (Waterford, WI, 53185), Tel/Fax.
- QuickFlow System:** Common, Docs Prep, Cast, Events, TDs, Checklists.
- Links & Referral:** Docs Folder (ABCCorp\S Corp), Ref Src (Existing Client), Ref | Arng.
- Key Dates & Info:** Form Date (1/15/2007), FY Mo (December), FY Day (31), EIN | SID (30-9999999).

BUSINESS FORMATIONS FORM

Secondary Tab

The screenshot shows the 'Matter Form - Change' application window with the 'Secondary' tab selected. The form contains the following data:

MatterRef	ABC Corp "S" Corp Formation	Code	\$BUFI Bus Form'n
MatterNo	07-1234	Bus Type	S Corp
Stage		Staff	RSB Robert S Brown
Client	ABC Corporation	Notify	<input type="checkbox"/>
		Trigger	<input type="checkbox"/>
		Review	<input checked="" type="checkbox"/>
		Billable	<input type="checkbox"/>
		Private	<input type="checkbox"/>
		Status	Open

Registered Office:

Agent	Robert George Forman
Address	2478 Penelope Street
Address 2	
City	Austin TX 78701
Tel/Fax	512.555.2424

Memo

The Secondary tab leaves you plenty of room to add your own fields.

It also includes a large free form Memo field to store extensive notes about the file.

BUSINESS FORMATIONS FORM

Additional Tab

The Additional tab leaves you plenty room to expand with your own unique fields.

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

The screenshot shows a software window titled "Matter Form - Change". The interface includes a menu bar (File, Edit, View, Process, Help) and a toolbar with icons for Save & Close, Save, and Cancel. Below the toolbar is a tabbed interface with the following tabs: Primary, Secondary, Additional (selected), Custom, Related, Notes, Documents, Phone, Email, Mail, Lexis, Billing, and Timeline. The main form area contains the following fields and controls:

- MatterRef: ABC Corp "S" Corp Formation (highlighted in yellow)
- MatterNo: 07-1234
- Bus Type: S Corp
- Code: \$BUFI Bus Form'n
- Staff: RSBIRobert S Brown
- Stage: Prospect - Atty Decision Needed
- Client: ABC Corporation
- Buttons: Notify, Trigger, Review (checked), Billable, Private
- Status: Open
- Closure Info section:
 - Close Date: [calendar icon]
 - Imaged?: [dropdown menu]
 - Destroy: [calendar icon]
 - Loc | Bin: [text input]

A vertical sidebar on the right side of the window is labeled "Matters - Additional".

CRITICAL INFORMATION AT A GLANCE

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

BUSINESS FORMATIONS MATTER SYNOPSIS

The Business Formations Matter Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts as well as others who play a role in the matter are displayed along with easy links back to the full Contact record. Key matter 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.

Abrams, Saul RE Buy from Lee, Jay ()
Client: Saul Abrams Code: /RE,BUY/
Source: Staff:

Key Contacts

Other Party:	Stacey Miller	Main Ph: 123.123.1234	jeff@ipassoc.com
Their Atty:	Debra Mackenzie	Main Ph: 789.456.1230	jeff@ipassoc.com
Our Agent:		Main Ph:	
Their Agent:	Theodore Boland	Main Ph: 212-555-6734	
Listing Agent:		Main Ph:	
New Lender:	Samuel P. Branch	Main Ph: 954-555-0231	
Title Co:		Main Ph:	
Surveyor:		Main Ph:	
Owners Assoc:		Main Ph:	
Mgmt Co:		Main Ph:	
Existing Lender 1:		Main Ph:	
Existing Lender 2:		Main Ph:	

Cast Members

Expert Walter Sufouri Environmental	Main Ph: 212-555-6548
Benny Siegel	Main Ph: 770.555.2121

Case Info

Offer	2/25/2008	PIN #
Acceptance	2/26/2008	PIN #2
Mort Conting		
Atty Approv		
Inspection		Price/Escrow, Earnest
Cl Dat Loc		

ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include annual meeting minutes, scanned copies of executed documents, financial statements – 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 returned
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!
- Cast Members: All the additional interested parties, such as officers, shareholders, bankers, lenders, etc.

CAST MEMBERS

- Having trouble keeping track of everyone involved in the matter?
 - Cast Member records provide a place to record each person's role in a matter
 - Easily track persons that play a role on a matter but aren't always used, such as officers, directors, vendors, partners, various agents, etc.

“SHAREHOLDER” CAST MEMBER

This Shareholder record is an example of Cast Member. It tracks this person’s unique relationship to this matter. How many shares do they own? What is their % ownership? Are they also an officer?

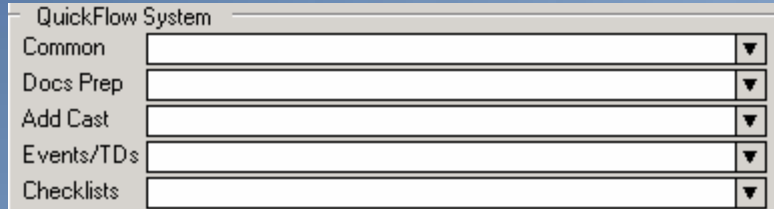
The screenshot shows a software window titled "Cast Form - Add" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The main area is divided into several sections:

- Primary / Related / Notes**: Navigation tabs.
- Date**: 5/31/2008, Sat, Time: 1:36pm, Code: .SH|Shareholder.
- Description**: Shareholder.
- Regarding**: ABC Corp "S" Corp Formation, 07-1234, ABC Corporation.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status.
- Contact Information**: Name: Linda Fleury, Title: President, Address: 4525 Redington Place, City: San Fernando, CA, 92155, Tel/Fax: 305-555-4736, Email: [empty].
- Shareholder Details**: Shares: 10000, % Ownshp: 50, Officer?: Yes.
- Relation**: Relation, DoB, SS#.
- Notes**: A large empty text area for notes.

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



QuickFlow System	
Common	▼
Docs Prep	▼
Add Cast	▼
Events/TDs	▼
Checklists	▼

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 Business Formations 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, always pulling the most current information on the linked contacts. Your own templates are easily added to the list.

Cast – Add Cast Members records to the matter such as Shareholders, Attorneys, CPA, etc.

Checklists – Easily track all the tasks and documents necessary to complete a business formation transaction or track annual meetings.

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/realestateorder.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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