ESTATE PLANNING LAW PRACTICE AREA TEMPLATE

for Time Matters®/Total Practice Advantage®

By

IP ASSOCIATES, LLC

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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?*

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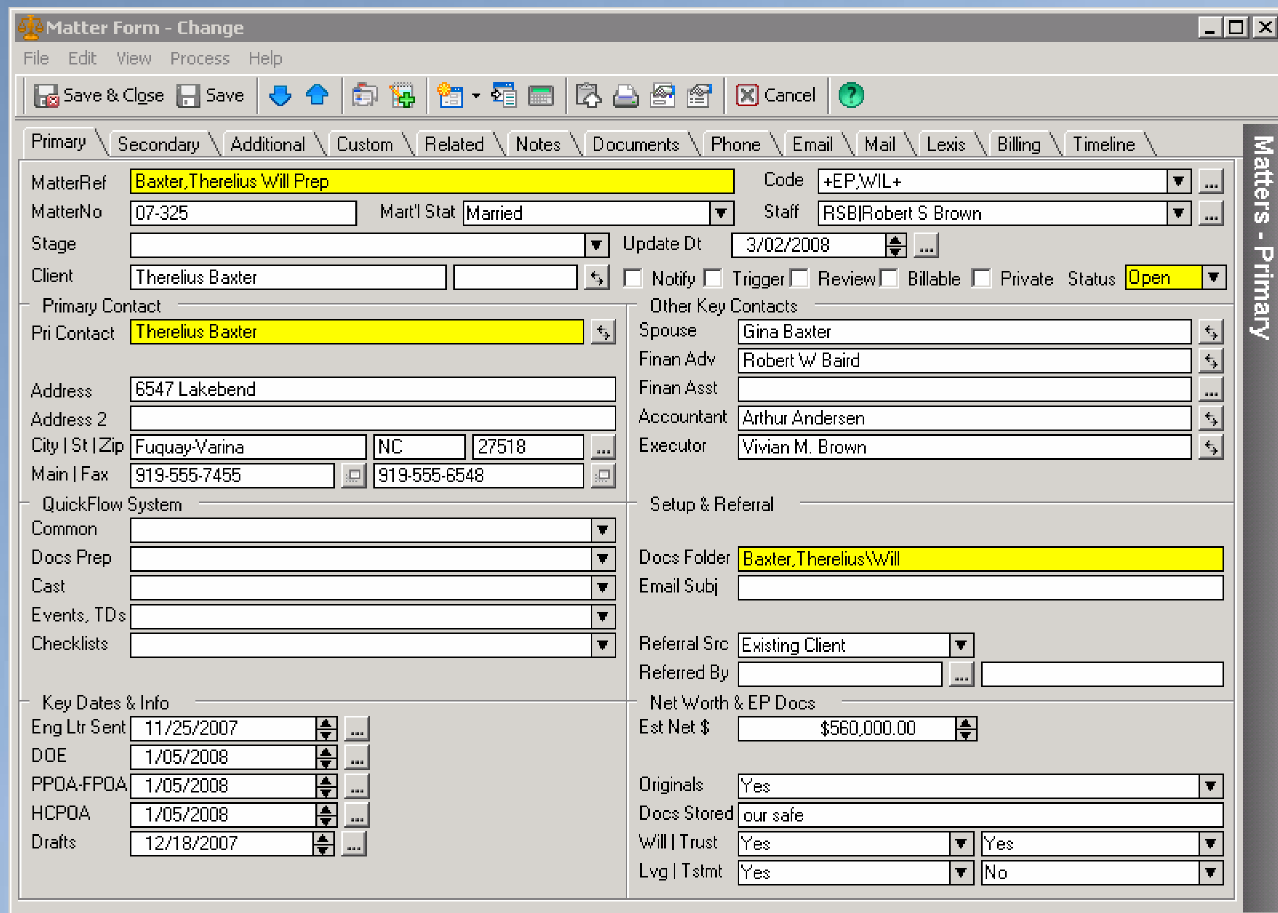
ESTATE PLANNING FORM
Primary Tab

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



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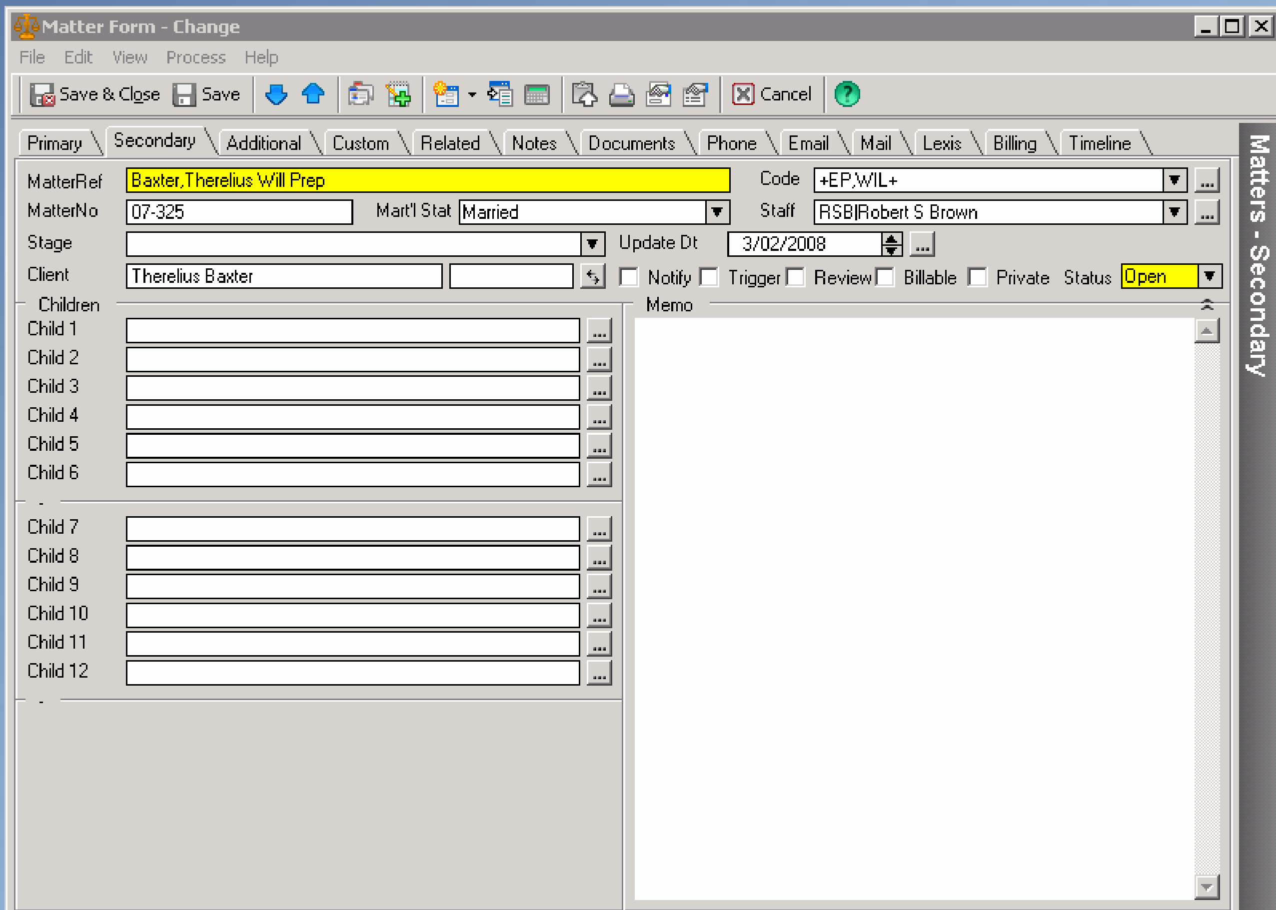
ESTATE PLANNING FORM
Secondary Tab



The Secondary tab includes links to the children's Contact records. Optionally, children can be entered as "Cast" records, eliminating the need to create contact records for each.

This tab also includes a large free form Memo field to take extensive notes about the matter.

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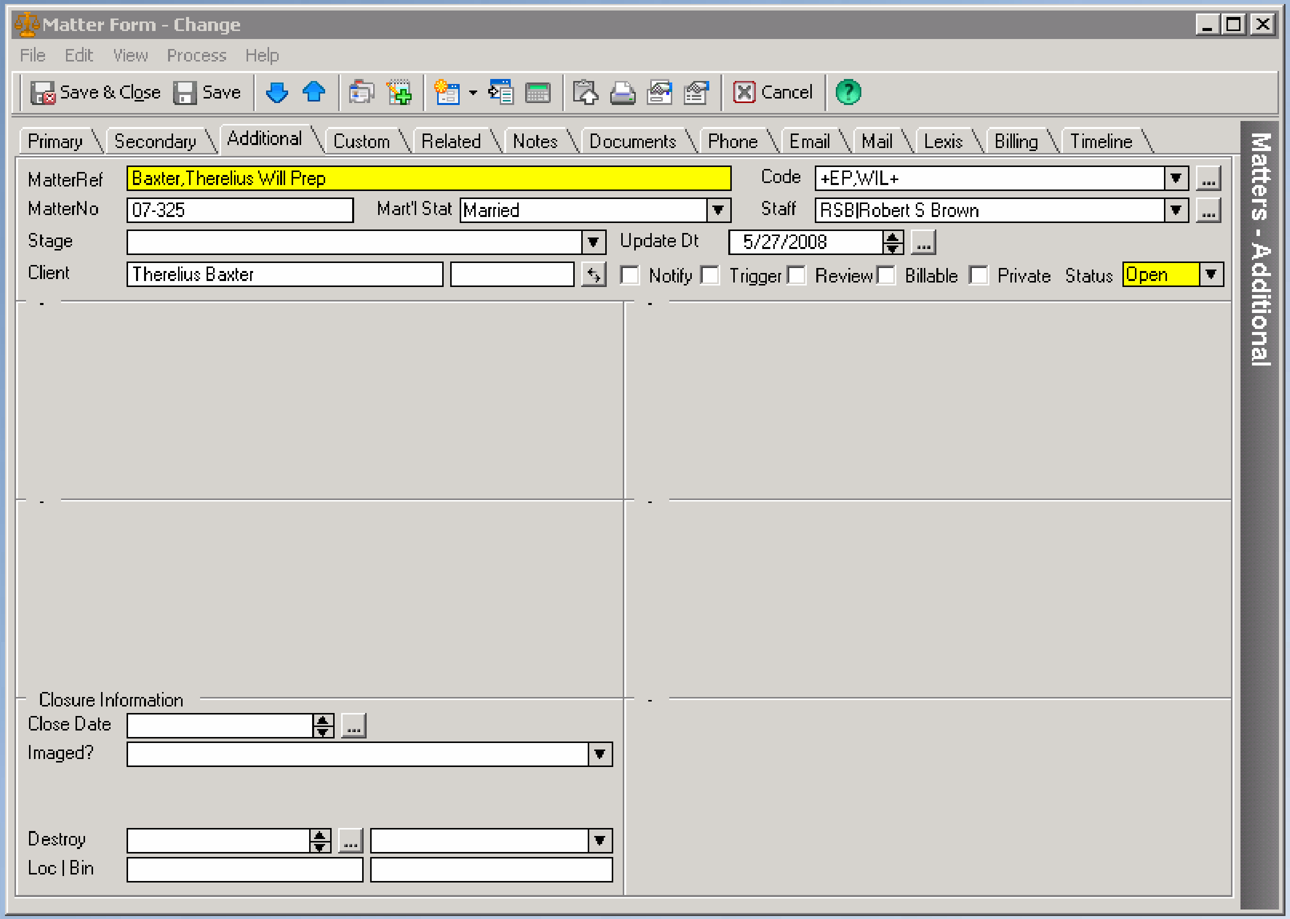
ESTATE PLANNING FORM
Additional Tab

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

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



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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 Estate Planning Practice Area Template

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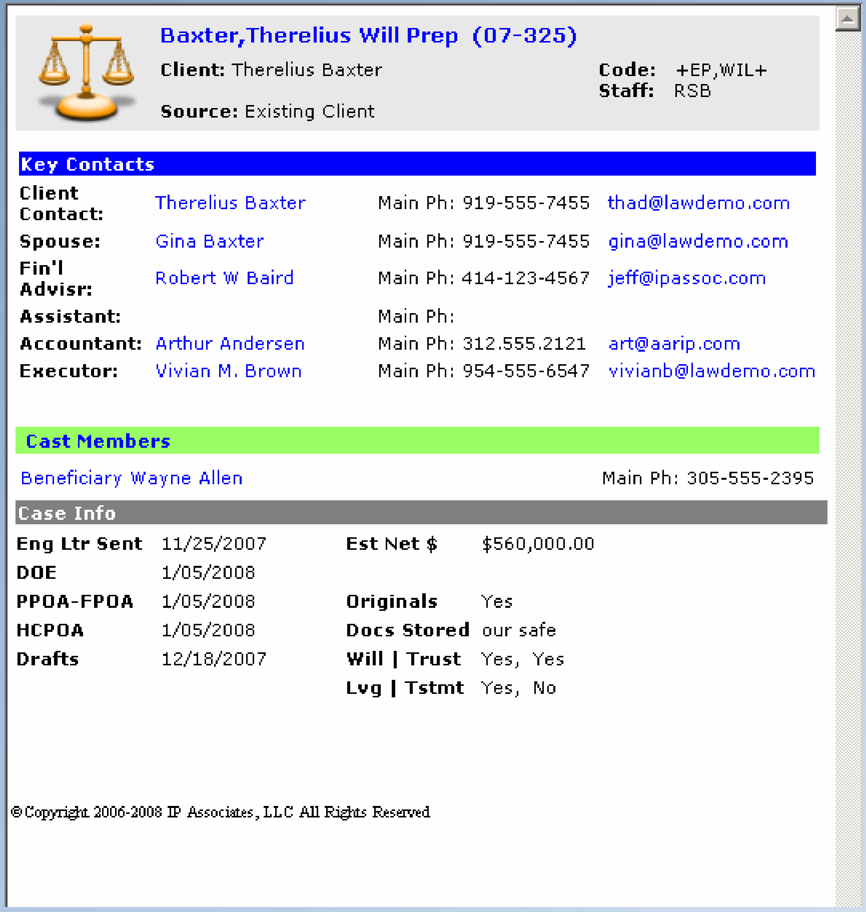
ESTATE PLANNING MATTER SYNOPSIS

The Estate Planning 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.



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ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include estate docs done in other applications, scanned copies of executed documents, photos of assets – 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: See all interested parties, such as children and beneficiaries.

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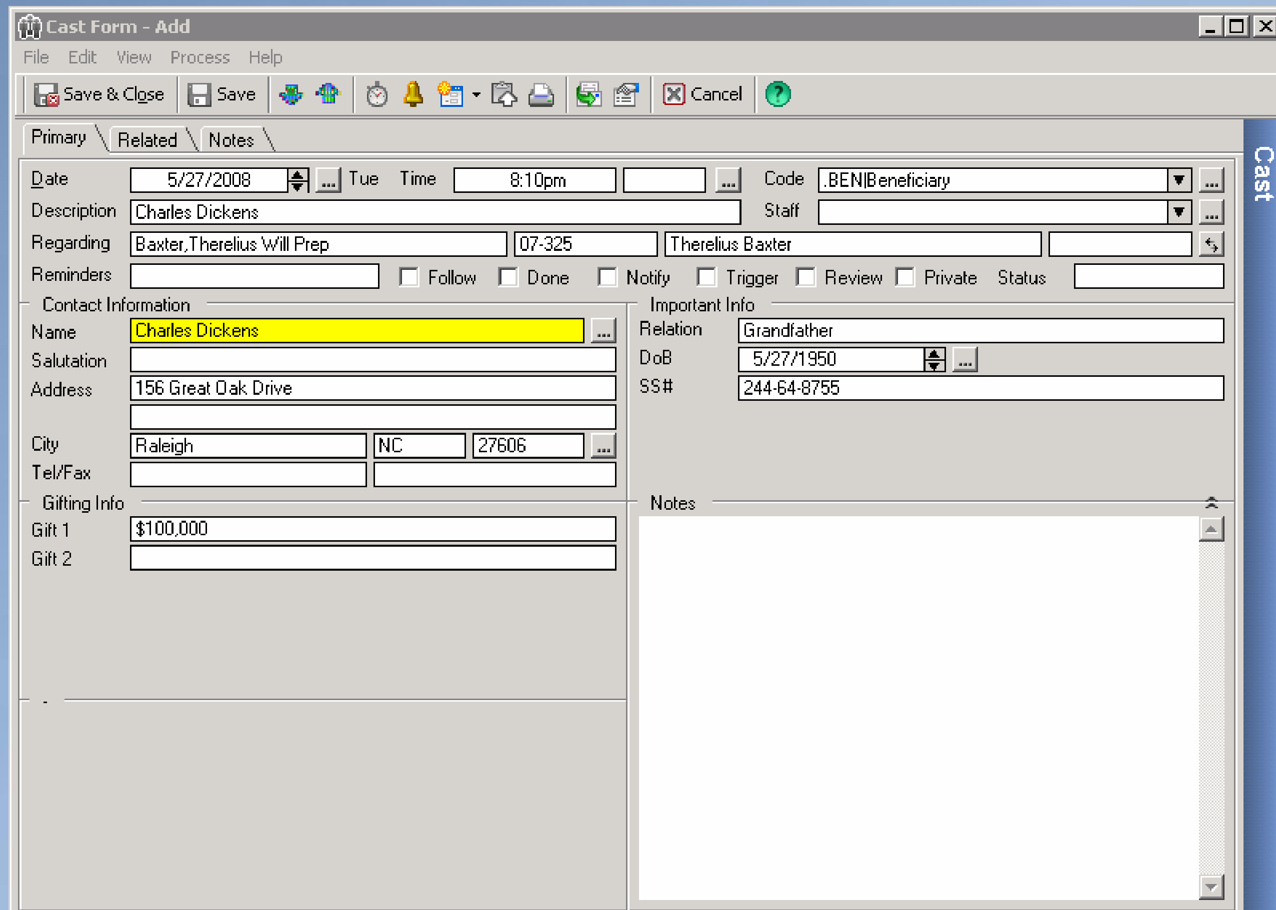
CAST MEMBERS

- 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
  - Quickly see all children and beneficiaries that includes emergency contact information

"BENEFICIARY" CAST MEMBER

This Beneficiary record is an example of Cast Member. It tracks this person's unique relationship to this matter. What specific bequests are being made to them. What is their relation to the persons planning their estate? What is their date of birth and social security number?



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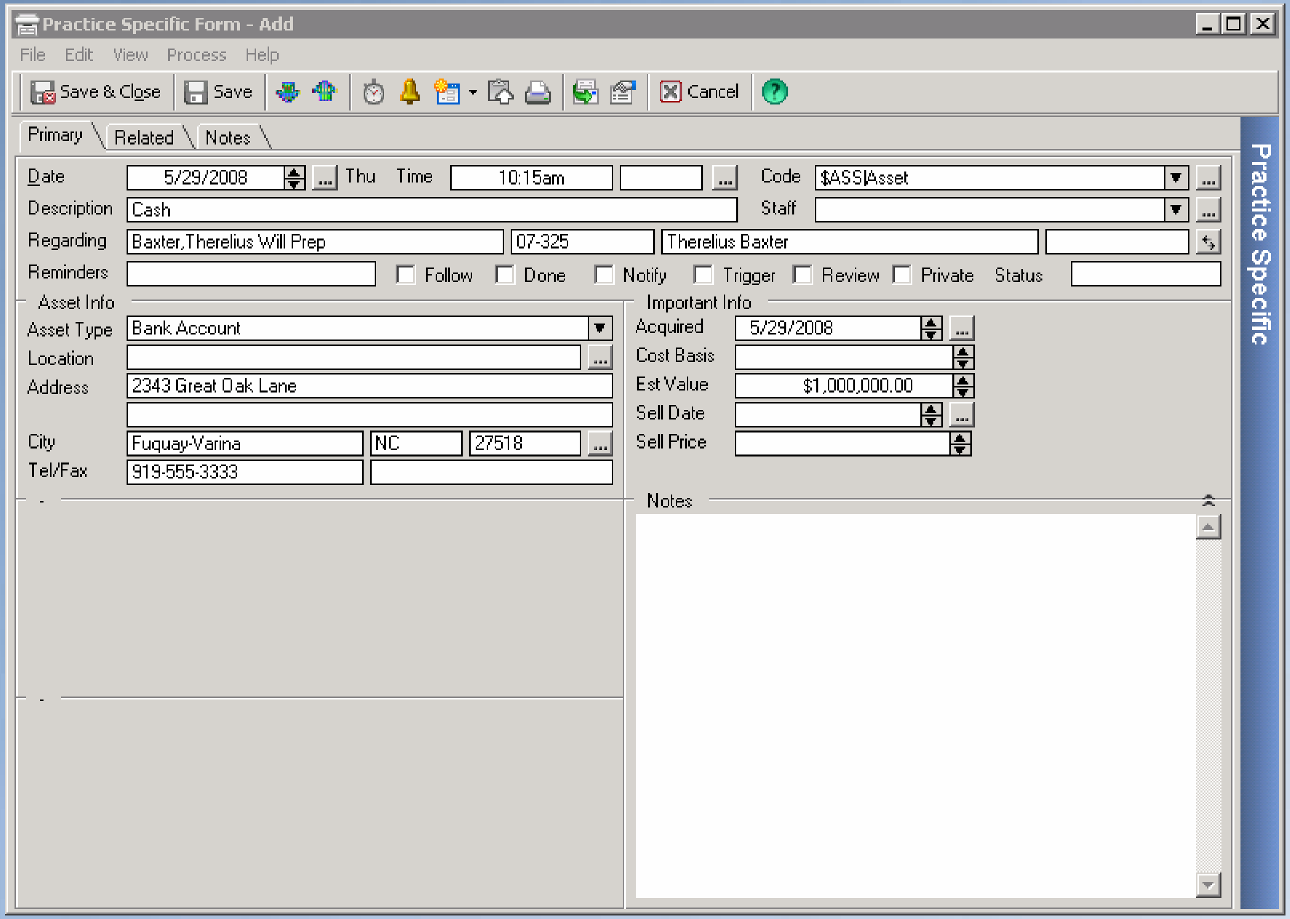
ASSET RECORD

Easily track the assets included in a plan using special Asset records. These records can be easily sent to Excel for inclusion in reports and documents and for totaling or analysis.



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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

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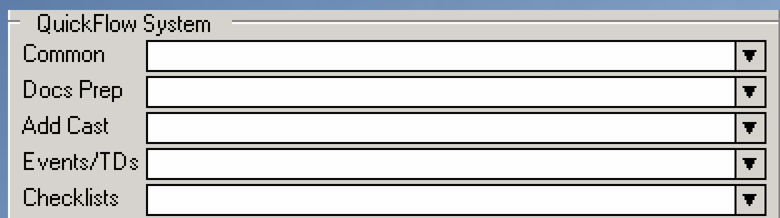
QUICKFLOW SYSTEM



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 Estate Planning 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 children and beneficiaries.
Checklists – use a checklist to track all the activities and documents necessary to produce the overall estate plan.

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.

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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/Estate Planningorder.htm](www.ipassoc.com/Estate%20Planningorder.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

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FOR MORE INFORMATION

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