TRUST ADMINISTRATION LAW PRACTICE AREA TEMPLATE

for Time Matters®/Total Practice Advantage®

By

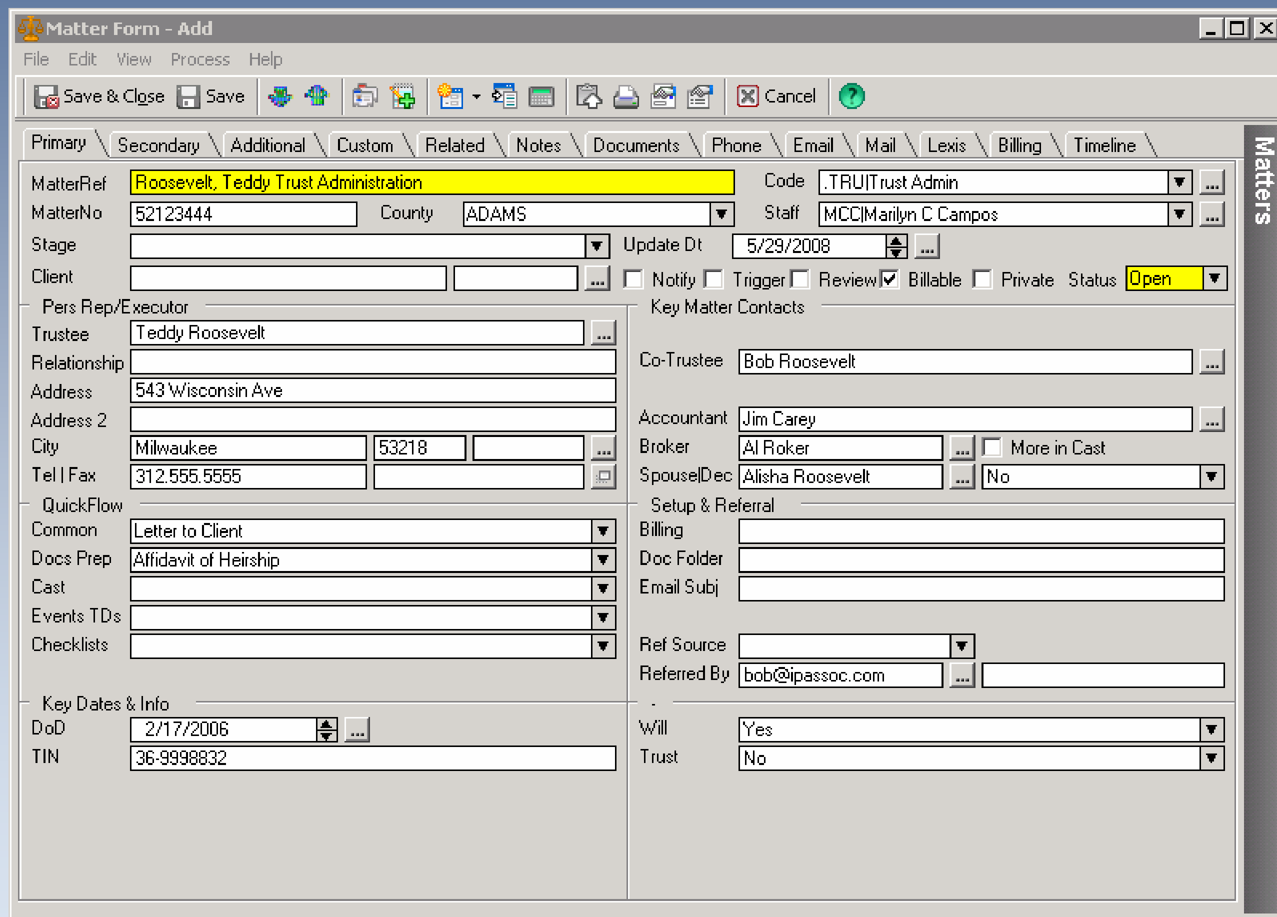
IP ASSOCIATES, LLC

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

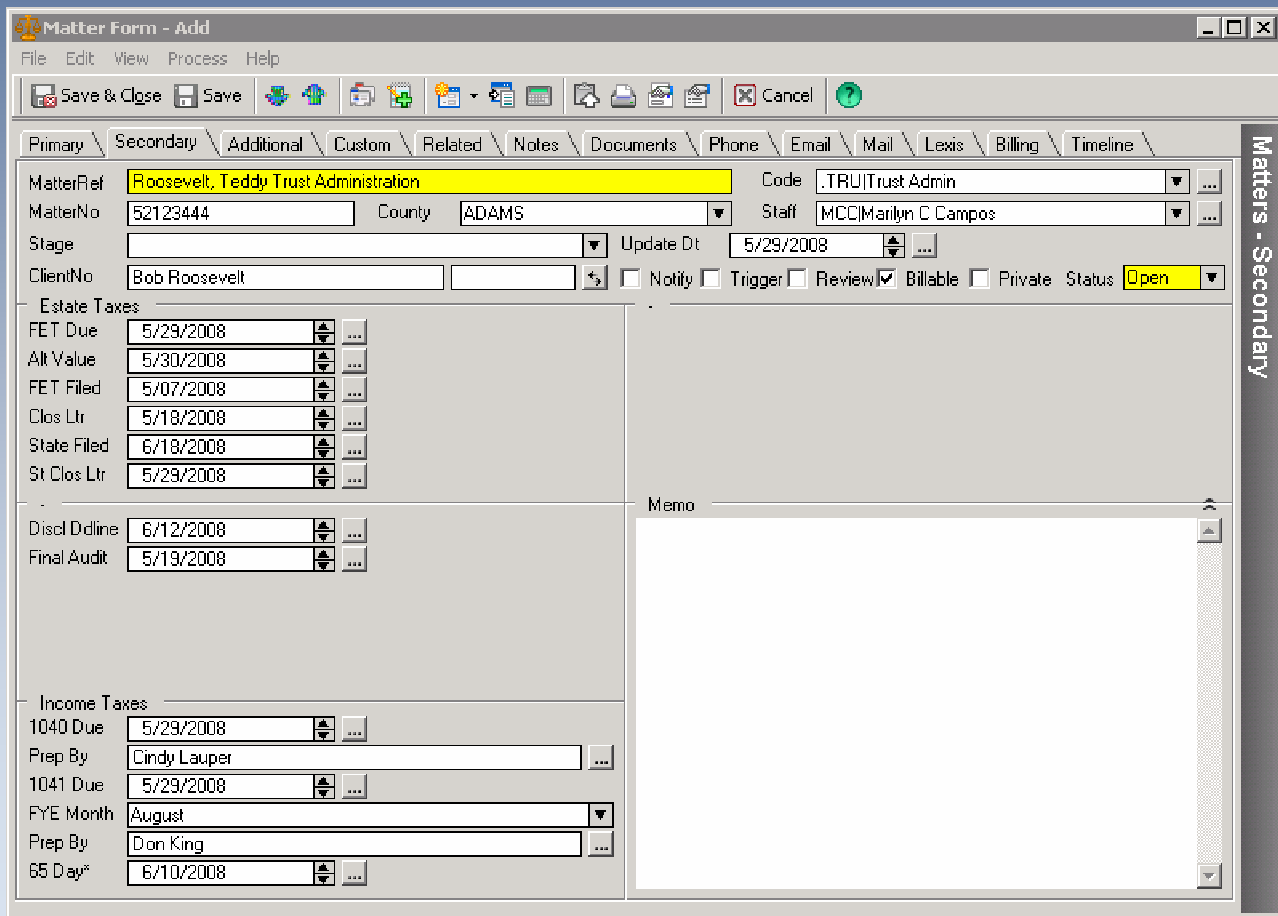
- *Tired of using the one size fits all setup that shipped with Time Matters?*
- *Frustrated that Time Matters isn't as easy to use as you expected?*
- *Concerned that a custom-tailored Time Matters configuration is too expensive and/or time consuming?*
- *Too busy practicing law to worry about designing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

TRUST ADMINISTRATION FORM 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.



TRUST ADMINISTRATION FORM
Secondary Tab



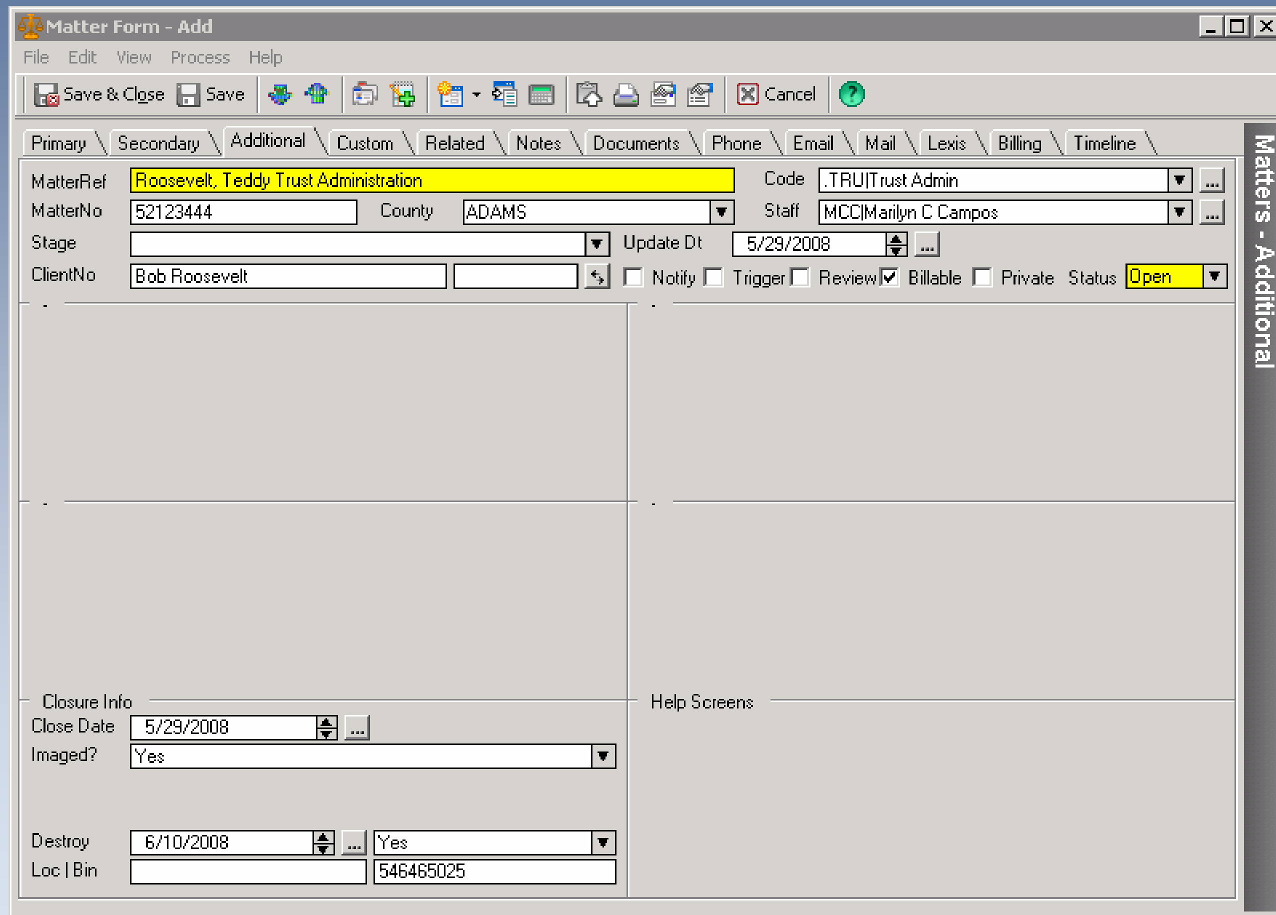
The Secondary tab leaves you plenty of room to add your own fields.

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

TRUST ADMINISTRATION 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.



CRITICAL INFORMATION AT A GLANCE

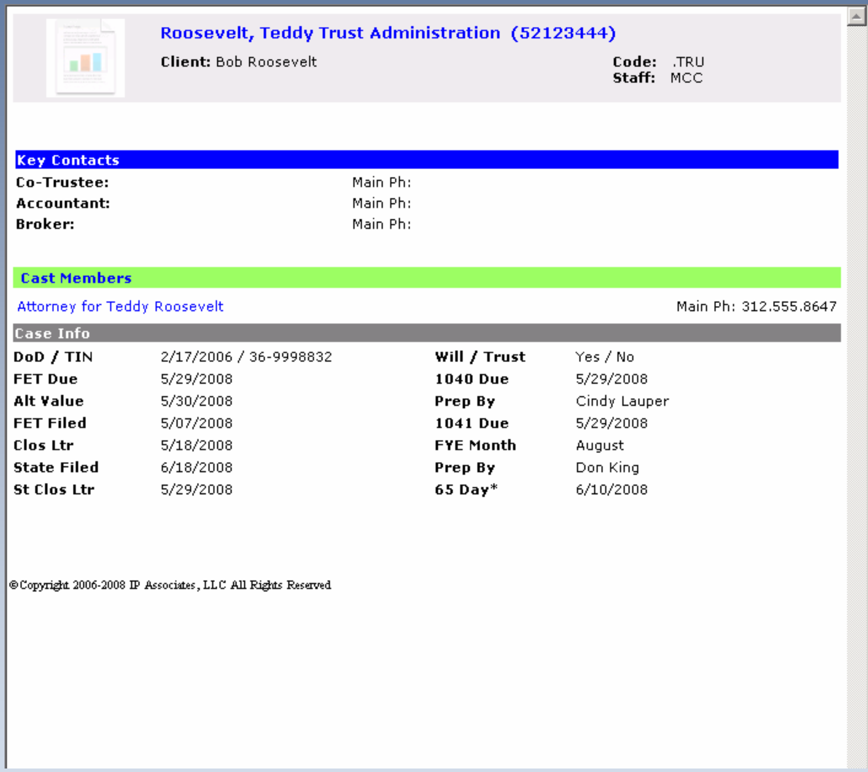
- Tired of looking in too many places for your critical matter information?
  - IP Associates unique Power Views look inside the Matter for you and pull out the most critical information in one easy to understand view
  - Get quick access to all matter documents, tasks that are yet to be completed, negotiations 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

TRUST ADMINISTRATION MATTER SYNOPSIS

The Trust Administration 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.



ADDITIONAL POWER VIEWS

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

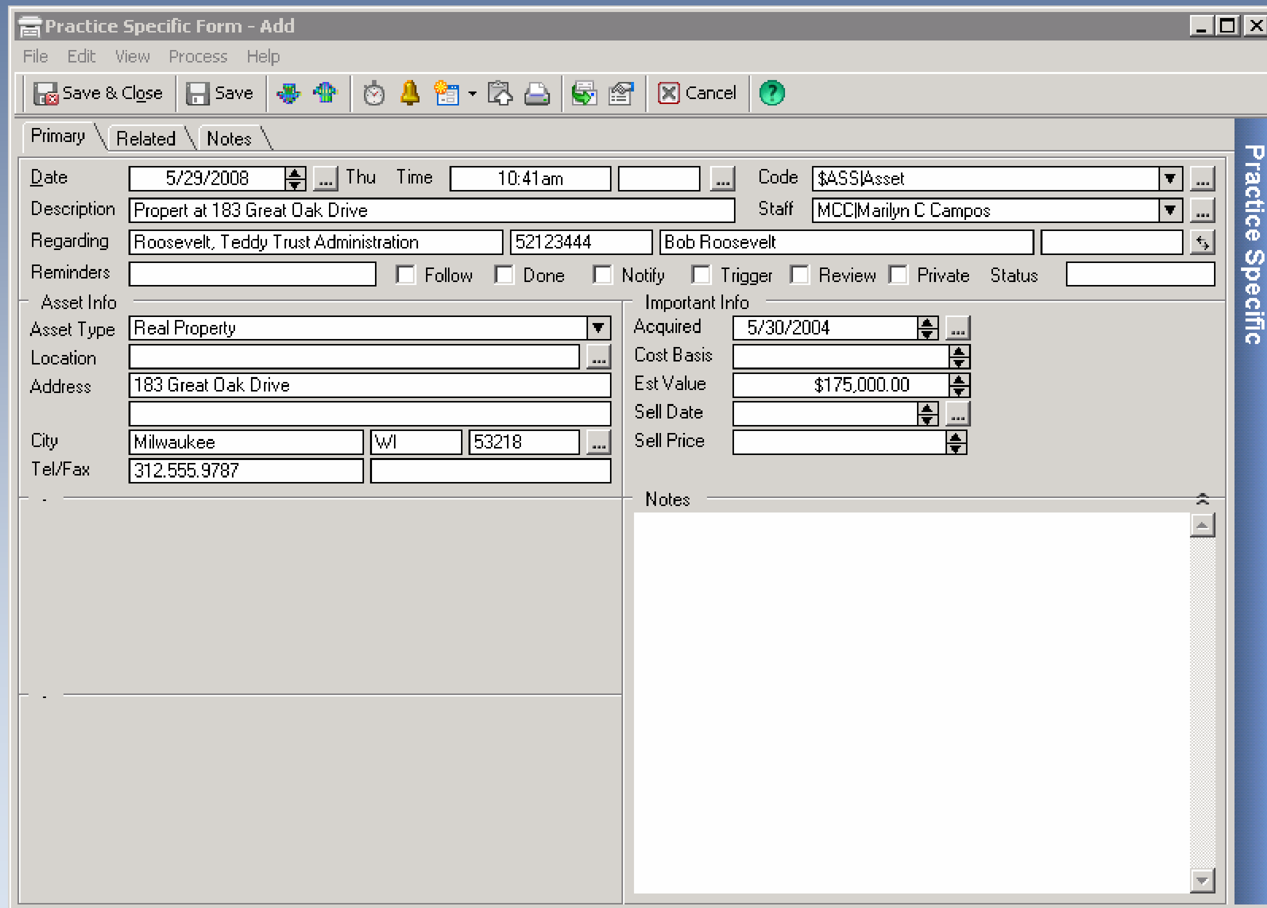
- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include meeting minutes, scanned copies of executed documents, financial statements – anything that can be saved as a file!
- Docs Due Back: View a list of any documents for which you expect 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, assets, 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.

“ASSET” CAST MEMBER

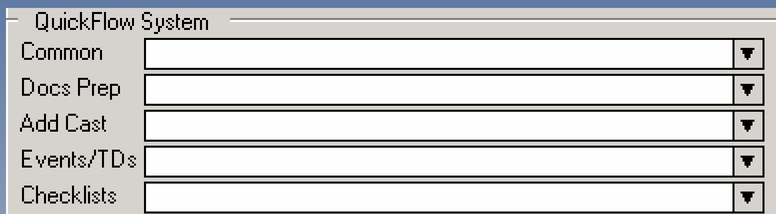
This Asset record is an example of Cast Member. It keeps track of all assets related to this matter. How much its worth? Any details regarding this asset can be put in this record.



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 Trust Administration 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 Member records to the matter such as Assets, Attorneys, CPA, etc.
Checklists –Easily track all the tasks and documents necessary to complete a Trust Administration 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
- Call 888-732-9071
- Download order form and fax to 866-258-9062

FOR MORE INFORMATION

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