

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.

The screenshot shows a software window titled "Matter Form - Add" with a menu bar (File, Edit, View, Process, Help) and a toolbar with icons for Save & Close, Save, and Cancel. The Primary tab is active, showing the following data:

| | | | |
|-----------|---------------------------------------|-----------|-------------------------------------|
| MatterRef | Roosevelt, Teddy Trust Administration | Code | .TRU Trust Admin |
| MatterNo | 52123444 | County | ADAMS |
| Staff | MCC Marilyn C Campos | Update Dt | 5/29/2008 |
| Stage | | Notify | <input type="checkbox"/> |
| Client | | Trigger | <input type="checkbox"/> |
| | | Review | <input checked="" type="checkbox"/> |
| | | Billable | <input type="checkbox"/> |
| | | Private | <input type="checkbox"/> |
| | | Status | Open |

Pers Rep/Executor

| | |
|--------------|-------------------|
| Trustee | Teddy Roosevelt |
| Relationship | |
| Address | 543 Wisconsin Ave |
| Address 2 | |
| City | Milwaukee |
| | 53218 |
| Tel Fax | 312.555.5555 |

QuickFlow

| | |
|------------|-----------------------|
| Common | Letter to Client |
| Docs Prep | Affidavit of Heirship |
| Cast | |
| Events TDs | |
| Checklists | |

Key Dates & Info

| | |
|-----|------------|
| DoD | 2/17/2006 |
| TIN | 36-9998832 |

Key Matter Contacts

| | |
|------------|---------------------------------------|
| Co-Trustee | Bob Roosevelt |
| Accountant | Jim Carey |
| Broker | Al Roker |
| | <input type="checkbox"/> More in Cast |
| Spouse/Dec | Alisha Roosevelt |
| | No |

Setup & Referral

| | |
|-------------|-----------------|
| Billing | |
| Doc Folder | |
| Email Subj | |
| Ref Source | |
| Referred By | bob@ipassoc.com |
| Will | Yes |
| Trust | No |

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.

Matter Form - Add

File Edit View Process Help

Save & Close Save [Icons] Cancel ?

Primary Secondary Additional Custom Related Notes Documents Phone Email Mail Lexis Billing Timeline

MatterRef: **Roosevelt, Teddy Trust Administration** Code: .TRUJTrust Admin

MatterNo: 52123444 County: ADAMS Staff: MCCIMarilyn C Campos

Stage: Update Dt: 5/29/2008

ClientNo: Bob Roosevelt

Notify Trigger Review Billable Private Status: Open

Estate Taxes

FET Due: 5/29/2008

Alt Value: 5/30/2008

FET Filed: 5/07/2008

Clos Ltr: 5/18/2008

State Filed: 6/18/2008

St Clos Ltr: 5/29/2008

Income Taxes

1040 Due: 5/29/2008

Prep By: Cindy Lauper

1041 Due: 5/29/2008

FYE Month: August

Prep By: Don King

65 Day*: 6/10/2008

Memo

Matters - Secondary

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.

The screenshot shows a software window titled "Matter Form - Add" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The "Additional" tab is selected, showing a form with the following fields and values:

| | | | |
|--------------|---------------------------------------|-----------|-------------------------------------|
| MatterRef | Roosevelt, Teddy Trust Administration | Code | .TRU Trust Admin |
| MatterNo | 52123444 | County | ADAMS |
| Staff | MCC Marilyn C Campos | Update Dt | 5/29/2008 |
| ClientNo | Bob Roosevelt | Notify | <input type="checkbox"/> |
| Trigger | <input type="checkbox"/> | Review | <input checked="" type="checkbox"/> |
| Billable | <input type="checkbox"/> | Private | <input type="checkbox"/> |
| Status | Open | | |
| Closure Info | | | |
| Close Date | 5/29/2008 | | |
| Imaged? | Yes | | |
| Destroy | 6/10/2008 | Yes | |
| Loc Bin | | 546465025 | |

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

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.

Roosevelt, Teddy Trust Administration (52123444)
Client: Bob Roosevelt Code: .TRU
Staff: MCC

Key Contacts

| | |
|-------------|----------|
| Co-Trustee: | Main Ph: |
| Accountant: | Main Ph: |
| Broker: | Main Ph: |

Cast Members

Attorney for Teddy Roosevelt Main Ph: 312.555.8647

Case Info

| | | | |
|-------------|------------------------|--------------|--------------|
| DoD / TIN | 2/17/2006 / 36-9998832 | Will / Trust | Yes / No |
| FET Due | 5/29/2008 | 1040 Due | 5/29/2008 |
| Alt Value | 5/30/2008 | Prep By | Cindy Lauper |
| FET Filed | 5/07/2008 | 1041 Due | 5/29/2008 |
| Clos Ltr | 5/18/2008 | FYE Month | August |
| State Filed | 6/18/2008 | Prep By | Don King |
| St Clos Ltr | 5/29/2008 | 65 Day* | 6/10/2008 |

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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.

The screenshot shows a software window titled "Practice Specific Form - Add" with a menu bar (File, Edit, View, Process, Help) and a toolbar (Save & Close, Save, Cancel, etc.). The form is divided into several sections:

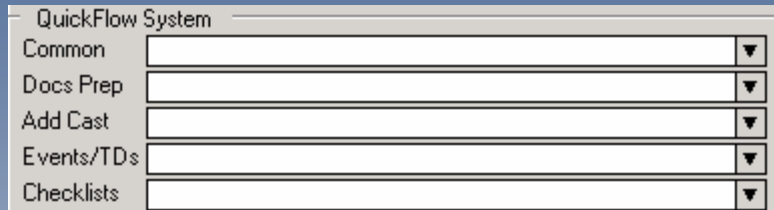
- Primary / Related / Notes**: Navigation tabs.
- Date**: 5/29/2008, Thu, Time: 10:41 am, Code: \$ASS\Asset.
- Description**: Property at 183 Great Oak Drive, Staff: MCC|Marilyn C Campos.
- Regarding**: Roosevelt, Teddy Trust Administration, 52123444, Bob Roosevelt.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status: [empty].
- Asset Info**:
 - Asset Type: Real Property
 - Location: [empty]
 - Address: 183 Great Oak Drive
 - City: Milwaukee, WI, 53218
 - Tel/Fax: 312.555.9787
- Important Info**:
 - Acquired: 5/30/2004
 - Cost Basis: [empty]
 - Est Value: \$175,000.00
 - Sell Date: [empty]
 - Sell Price: [empty]
- Notes**: A large empty text area for additional information.

A vertical blue bar on the right side of the window is labeled "Practice Specific".

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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