

Probate Form Style Primary Tab

Matter Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel [Icon]

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

MatterRef **Carlton, Sydney - Probate** Code .PRO|Probate

MatterNo 08-0456 County ADAMS Staff RSB|Robert S Brown

Stage Prob Reason Regular Probate Administration-Decedent

Client (PR) Lucie Darnay Notify Trigger Review Billable Private Status Open

Pers Rep/Executor

Pers Rep Lucie Darnay

Relationship

Address 456 7th Street

City New London 12345

Tel/EM 123-456-7890 987-654-3210

QuickFlow System

Common

Docs Prep

Cast

Events, TDs

Checklists

Key Dates & Info

DoD 1/02/2008

TIN 12-3456789

Will Adm 2/02/2008

Publication 3/02/2008

Inv | Notice 3/10/2008 3/15/2008

Will | Trust Yes Yes

Key Matter Contacts

Decedent Sydney Carlton

Co-Executor Charles Darnay

Trustee Robert W Baird

Accountant Tellson & Tellson

Appraiser John Barsad Spouse on tab 3

Guard | GAL

Setup & Referral

Docs Folder **Carlton, Sydney\Probate**

Email Subj

Ref Source Website

Referred By

Case Info

Case # 08-PR-123456

Circuit FIRST

Judge Louis Defarge

Clerk Emily Pross

Rm #

Matters

Address and contact information the Personal Representative or Executor

QuickFlow system provides instant access to commonly performed functions

Enter important Probate related dates in this area

Track the key contacts for the Probate with links back to their Contact record

Important internal and marketing information

Important court information is available at a glance

Probate Form Style Secondary Tab

Matter Form - Change
File Edit View Process Help

Save & Close Save [Navigation Icons] Cancel [Help Icon]

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

MatterRef: **Carlton, Sydney - Probate** Code: .PRO|Probate
MatterNo: 08-0456 County: ADAMS Staff: RSB|Robert S Brown
Stage: Prob Reason: Regular Probate Administration-Decedent
Client (PR): Lucie Darnay Notify Trigger Review Billable Private Status: Open

Estate Taxes
FET Due: 9/01/2008
Alt Value: 9/01/2008
FET Filed:
Clos Ltr:
State Filed:
St Clos Ltr:

Other Key Dates
Claims Date*:
Status Hrg*:
Estate Closed:

Disc'l Ddline:
Final Audit:

Income Taxes
1040 Due: 9/01/2008
Prep By: Tellson & Tellson
1041 Due: 9/01/2008
P/E Month: December
Prep By: Tellson & Tellson
65 Day*:

Memo
This area is for important note about the Probate.

Matters - Secondary

Estate Tax key
dates and
deadlines

Additional Key
Dates

Income Tax key
dates and
deadlines

Large Memo
section for file
notes

Probate Form Style Additional Tab

Matter Form - Change

File Edit View Process Help

Save & Close Save [Navigation icons] Cancel [Help icon]

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

MatterRef **Carlton, Sydney - Probate** Code .PRO|Probate

MatterNo 08-0456 County ADAMS Staff RSB|Robert S Brown

Stage Prob Reason Regular Probate Administration-Decedent

Client (PR) Lucie Darnay Notify Trigger Review Billable Private Status Open

Spouse Info

Spouse

Deceased?

Spouse SS#

Closure Info

Close Date

Imaged?

Destroy

Loc | Bin

Matters - Additional

Information about
the decedent's
spouse

Important
internal file
closing
information

Plenty of Room!

If you think we forgot a field or need to track information unique to your jurisdiction, there are over thirty (30) fields available on this screen. Unlike many other feature packages, we leave you room to expand. How you use these fields is up to you.


Probate Synopsis Power View

The Probate Synopsis Power View provides quick access to all of the important people involved in the Probate.

This Power View reads the Contacts linked in the Key Contacts section of the Probate Form Style Primary Tab. It then creates a hyperlink to the Contact record of that individual or firm, displays the phone number and creates an additional hyperlink to the Contact's email address.

In addition, this Power View displays all Cast Member records linked to the Probate. Cast Member records define the specific role played by a person or organization in one particular matter. Cast Member records allow you to establish links between experts, attorneys, judges and others on every matter in which they are involved.

By providing quick access to Contacts and Cast Members, the Probate Synopsis Power View saves you time and mouse clicks.

**Carton, Sydney - Probate (08-0456)**
Client: Lucie Darnay **Code:** .PRO
Staff: RSB

Key Contacts

Personal Rep:	Lucie Darnay	Main Ph:	
Decedent:	Sydney Carton	Main Ph:	123-456-7890 jeff@ipassoc.com
Co-Exec:	Charles Darnay	Main Ph:	123-456-7890 jeff@ipassoc.com
Trustee:	Robert W Baird	Main Ph:	414-123-4567 jeff@ipassoc.com
Accountant:	Tellson & Tellson	Main Ph:	123-456-7890 jeff@ipassoc.com
Appraiser:	John Barsad	Main Ph:	123-456-7890 jeff@ipassoc.com
Guardian:		Main Ph:	
GAL:		Main Ph:	

Cast Members

Judge Louis Defarge	Main Ph: 123-456-7890
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Practice Specific Form Asset

Practice Specific Form - Change

File Edit View Process Help

Save & Close Save Cancel

Primary Related Notes

Date 5/05/2008 Mon Time 10:04am Code \$ASS)Asset

Description Property at 123 Dickens Street Staff

Regarding Carton, Sydney - Probate 08-0456 Lucie Darnay

Reminders Follow Done Notify Trigger Review Private Status

Asset Info

Asset Type

Location

Address 123 Dickens Street

City Paris TN 12345

Tel/Fax

Important Info

Acquired 1/01/1975

Cost Basis \$74,000.00

Est Value \$215,000.00

Sell Date

Sell Price

Notes

Practice Specific

This area tracks the location of the Asset

Track Asset date of acquisition, cost basis, and estimated value in this area

Practice Specific Forms allow you to track information about items specific to matters within a practice area. Depending on the practice area, examples of these forms range from Assets to Insurance Policy information.

Cast Member Form Judge

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

- Primary** (selected):
 - Date: 5/05/2008 (Mon) Time: 9:59am Code: JUDJudge
 - Description: Judge Louis Defarge Staff: [empty]
 - Regarding: Carton, Sydney - Probate 08-0456 Louis Defarge
 - Reminders: [empty] Follow [] Done [] Notify [] Trigger [] Review [] Private [] SrvcLst [Y]
- Related**: [empty]
- Notes**: [empty]
- Contact Information**:
 - Name: Louis Defarge (highlighted in yellow)
 - Court: Adams County Probate Court
 - Address: 9876 5th Street
 - City: Chicago IL 12345
 - Tel/Fax: 123-456-7890 987-654-3210
- Additional Info**:
 - Email: jelf@ipassoc.com
 - Clerk: [empty]

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

The Cast Member is linked to the Probate Matter in the Regarding Line

The Cast Member is linked to the Contact record of the Cast Member in the Regarding Line

Use this area to take notes describing the Cast Member's relationship to this particular Probate matter

Cast Member records define the specific role played by a person or organization in one particular matter. Cast Member records allow you to establish links between experts, attorneys, judges and others on every matter in which they are involved.

Probate QuickFlow System

The Probate QuickFlow System automates common functions. Each pull down arrow contains a list of commonly performed activities. Selecting an activity from the list, causes QuickFlow to execute that function.

The screenshot shows a window titled "QuickFlow System" with a "Key Dates & Info" section at the bottom. It contains five pull-down menus:

- Common
- Docs Prep
- Cast
- Events, TDs
- Checklists

Common

Delegate a ToDo
Case Alert
Case History Note/Phone Call
Negotiation Phone Call

*****Correspondence*****

Letter to Client
Letter to Primary Contact
Letter to Cast Member
Fax Cover to Client
Fax Cover to Primary Contact
Fax Cover to Cast Member
Fee Arrangement Letter
Decline Letter

Docs Prep

*****Correspondence/Letters*****

Letter to Accountant
Letter to Appraiser
Letter to Co-Executor
Letter to GAL
Letter to Judge
Letter to Referring Contact
Letter to Spouse
Letter to Trustee

*****Documents*****

Affidavit as to Copy of Will
Affidavit of Heirship
Application for Tax Number (Form SS-4)
Claims Publication Form
Notice to Heirs and Legatees
Oath & Bond - no surety
Order Admitting Will to Probate
Order Declaring Heirship
Petition for Probate of Will
Power of Attorney (Form 2848 IRS)
Probate Division Cover Sheet
Unknown Heirs Notice
Waiver of Notice

Cast

Add Attorney
Add Buyer (Additional)
Add Environmental Expert
Add Lender
Add Other Interested Party
Add Seller (Additional)
Add Soil Expert
Add Structural Expert
Add Title Company
Add Water Expert

Events, TDs

None

Checklists

Probate Checklist