



Essential Estate Planning™

Essential Estate Planning™ is our most cost-effective estate planning and drafting system, but with the robustness and high technical quality you would expect from **InterActive LegalSuite™**. Wills, Revocable Trusts, Irrevocable Trusts, Powers of Attorney and client administrative materials are included. The system includes state specific language, options and forms.

Estate Planning Author Team

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Essential Estate Planning™ is specially designed for essential estate planning for clients of modest wealth. **Essential Estate Planning™** manages a large amount of transactional work and contains a collection of forms, each one featuring many options to meet most clients' planning needs. An internal database organizes your client information and documents. The system helps you analyze each client's situation and generates accurate, complete and effective documents – every time!

STANDARD VERSION - The Standard version covers the most common planning scenarios for clients who prefer a less complex plan or have non-taxable estates. You can add licenses and seamlessly upgrade to the Professional version at any time during the subscription cycle (pro-rated fees apply). Thirty (30) days technical support is included.

PROFESSIONAL VERSION — The Professional version contains all of the forms, commentary, tutorials and analyses in the Standard version, but with expanded services. The Professional version includes unlimited technical and content support, free access to all the Leimberg Information Services (LIS)™ research tools (via web link) and more.

Essential Estate Planning™ utilizes a proprietary user-interface (patent pending) that organizes and manages your clients and documents in an easy-to-navigate "tree" structure. The system can be installed on a single computer or network, and is multi-user and network compliant. Customization tools permit users to modify the form language, styles and default answer sets. A full security module controls user permissions.

Essential Estate Planning™ is subscription-based and renewable annually. The HotDocs® Player software is included with all licenses at no additional cost. Both versions are updated regularly through a web updating service. **Twelve months of content updating service is included.**

TECHNICAL SPECIFICATIONS

System Requirements

- PC with Windows® 98 or later (may run on later Macintosh® computers with Windows emulation software)
- Pentium Processor (or better)
- 200MB disk space
- MS Word 2000 (or later) (required)
- WordPerfect 12 (or later) (optional)

Network Compatible

- Windows® LAN/WAN Server
- Novell Netware®
- Citrix® Server
- Terminal Services
- Peer-to-Peer Windows® Networking

Essential Estate Planning™ Version Comparison Chart

Forms and Planning Options	Standard Version	Pro Version
Wills: Pourover; non-taxable; A/B trust; (community & separate property). State-specific options and language, including self-proving affidavits	X	X
Revocable Trusts: Revocable Trusts (single grantor; joint grantors; community & separate property); for taxable and non-taxable estates (state-specific options and language)	X	X
Powers of Attorney: Durable Powers of Attorney; Health Care Directives (Powers of Attorney); HIPAA Authorization; Living Wills -- all forms are state specific	X	X
Irrevocable Trusts: ILIT (with or without life insurance) — basic planning techniques	X	X
Client Planning & Letters: Planning Questionnaires; Engagement Letters; Fee Agreements; DocuBank™ Transmittal Letters & Client Enrollment Forms	X	X
Memos, Checklists & Miscellaneous: Memo to Practitioners recommending use of a will vs. revocable trust; memo regarding property transfers to minors; memo regarding transfers in trust vs. outright transfers	X	X
Technical & Support	Standard Version	Pro Version
Basic web-based training —Functionality and Formatting Classes	X	X
Basic Technical & Content Support —Live phone and web support for 30 days	X	X
Extended Technical & Content Support —Live phone and web support for 12 months	N/A	X
Legal Discussion Forum & Knowledgebase	X	X
Personal Coaching —90-minute one-on-one coaching session (using web link)	X	X
LISI Services —Free access to Leimberg Information Services (LISI) research tools via web link	N/A	X
Advanced web-based training —Customization classes	N/A	X
Individual 1+1 License —One License for desktop and second for laptop or home PC (same user)	N/A	X

*TimeMatters® Feature Package is a product of Basha Systems, LLC (www.bashasys.com). TimeMatters and Feature Package must be purchased separately.

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Technical & Support	Standard Version	Pro Version
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Basic Technical & Content Support —Live phone and web support for 30 days	X	X
Extended Technical & Content Support —Live phone and web support for 12 months	X	X
Legal Discussion Forum & Knowledgebase	X	X
Personal Coaching —90-minute one-on-one coaching session (using web link)	X	X
Customization Tools —functions permitting customizing of language in templates; profiles	N/A	N/A
Advanced web-based training —Customization classes	N/A	N/A
Individual 1+1 License —One License for desktop and second for laptop or home PC (same user)	N/A	X

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AUTHORED SYSTEMS

InterActive LegalSuite™ expert drafting systems are authored by the some of the country's most prominent and influential attorneys. All of our expert drafting software systems are HotDocs® based and updated regularly.

- Written by nationally recognized experts
- Comprehensive form sets, for basic and advanced planning
- National in scope, with select state forms and options
- State specific language and options
- Powered by HotDocs® (HotDocs® Player included)
- Proprietary client/document manager (patent pending)
- Single and Multi-user licenses available (fully network compatible, including Citrix)

SUPPORT & TRAINING

- Technical and content support (live)
- Tutorials, Web-Based training classes and personal coaching all included
- Advanced technical courses available (additional charge)
- Continuing legal education delivered through webinars and workshops (additional charge)

PRODUCT FEATURES

- Intuitive, easy-to-use client/matter/document format
- Powered by advanced HotDocs® technology (HotDocs Player software is included, at no additional cost)
- Extensive help system, including videos and tutorials
- Audio/Visual legal tutorials and context sensitive help provide author assistance and commentary
- Document "preview" mode lets you see the document before all the data has been entered

INTEGRATED MODULES

- SmartContent Manager organizes clients and matters
- FileManager automatically names, stores and retrieves document files
- SecurityManager provides multi-user access, control over user rights, file locking, back-up/restore functions
- PreferenceManager stores and manages your firm's drafting preferences
- HelpManager provides quick access to tutorials and help resources

PRICING

	Standard Version		Professional Version	
	From only \$208 per month		From only \$275 per month	
User Licenses	Annual Payment	Quarterly Installments*	Annual Payment	Quarterly Installments*
1	\$2,495	\$661	\$3,295	\$873
1+1 **	N/A	N/A	\$3,295	\$873
2	\$2,995	\$794	\$3,845	\$1,019
3	\$3,495	\$926	\$4,395	\$1,165
4	\$3,795	\$1,006	\$4,795	\$1,271
5	\$4,095	\$1,085	\$5,195	\$1,377
6+	Call for pricing		Call for pricing	\$1,443

* Includes 6% service charge

** 1+1 licensing available in Professional version only

LICENSING

Essential Estate Planning™ is offered as a 12 month subscription, renewable annually (a discount applies to all renewals if renewed within 30 days of product code expiration date).

SEAMLESS UPGRADES

Need more licenses? You can add to your **Essential Estate Planning™** licenses at any time. Your subscription will be prorated for the remainder of your term. A new product code will be sent via email within 24 hours of your upgrade request. Want to be able to draft tax oriented estate planning documents such as GRATs, QPRTS, Charitable Trusts and more? You can subscribe to **Wealth Transfer Planning™** (Standard or Professional versions) and retain all your client and document data.

SEEING IS BELIEVING

Contact us for more information or to schedule a private web demonstration. Call (321) 252-0100 or email us at sales@InterActiveLegal.com.



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