Estate Planning Using DPS

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<td>My name is Kendall Brown, and I have been an estate planning lawyer for over forty years. In connection with my estate planning practice, I have developed the Document Production System (DPS) which has enabled me to produce high quality estate planning documents in a fraction of the time I had previously spent. The estate planning documents include Wills, Revocable Trusts, Irrevocable Trusts and Powers. They have been customized for all fifty states.</td>
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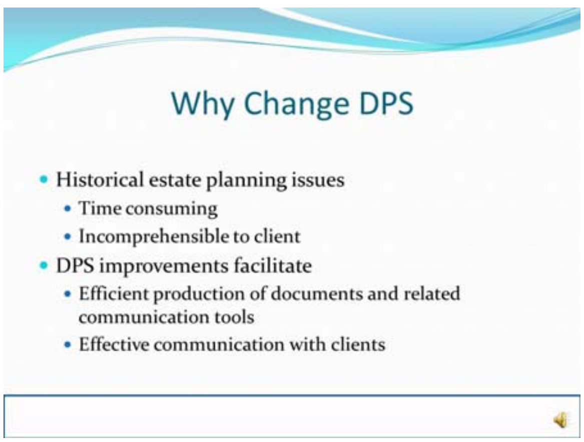
<td>
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<td>Historically I have found that clients view estate planning as a big, black box. They object to the amount of time required to craft their estate plan and they find it very difficult to read and understand the actual estate planning documents. Consequently, clients don't appreciate what has been accomplished for them. Recently I made an exciting improvement to DPS which allows more efficient production of legal documents and facilitates effective communication of the content of those documents to my clients.</td>
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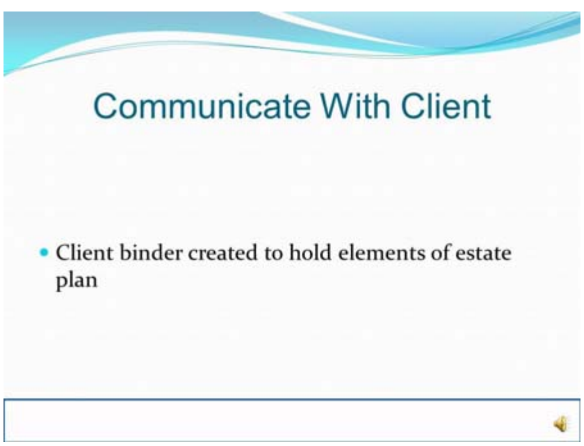
<td>
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<td>Let me explain the techniques I've developed to overcome these issues when estate planning for my clients: I provide a three-ring binder to each client. That binder will contain all of their estate planning documents once completed.</td>
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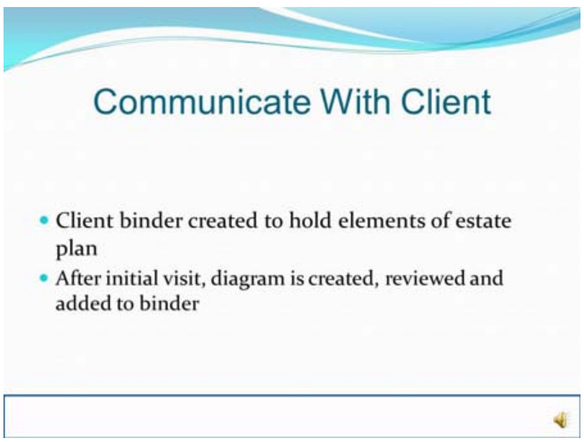
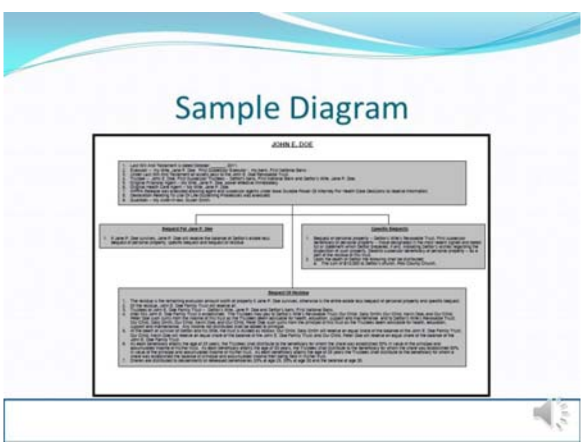
	DPS can now produce an array of items needed to complete the client's estate planning binder. This includes a table of contents which outlines all the documents that will ultimately be created in the estate planning process. DPS also creates cover sheets for the binder itself as well as cover sheets for the Wills and Trusts if desired. Finally it provides various cover letters which I use to mail the binder to clients, mail the documents for review by clients, request they call to schedule an appointment to execute the documents, etc.
	After the initial contact with the estate planning client, I create a Diagram to summarize the provisions of the proposed estate planning documents. It is one page and enables the client to truly understand what their Will or Revocable Trust document will contain. The Diagram is reviewed by the client before the legal documents are actually prepared and is included under the first tab of the binder.
	Recent DPS updates allow the creation of these Diagrams. As you look at the illustration, you'll see the Diagram provides an easily understandable summary of the client's situation and desires.

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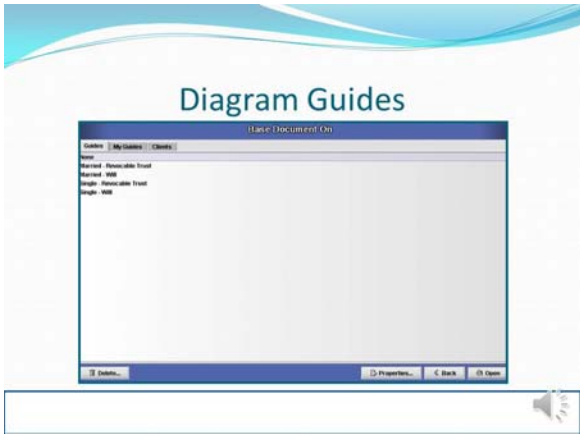

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<td>To create this Diagram, DPS provides a number of different guides which allow me to start with many of the questions pre-answered and then customize answers to cover my client’s individual needs. As always, I can also create my own guides as suit my unique practice.</td>
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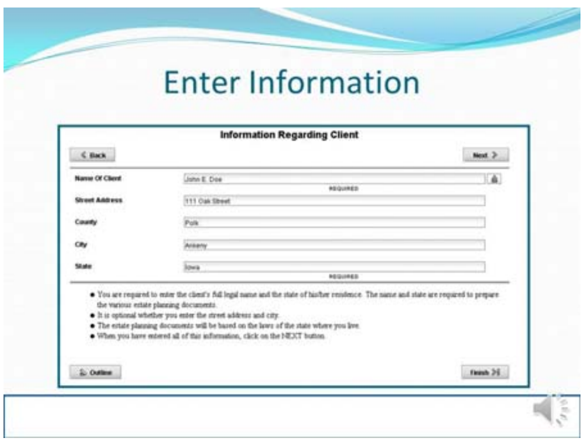

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<td>Since DPS is an intuitive system, I only enter the client’s information one time. The information will then be linked to the various documents in every step of the estate planning process. Once I click through and add the necessary information, I Produce the Diagram and send it to the client for review. DPS produces the Diagram as a PDF allowing me to choose to attach it to an email or print a paper copy for the client.</td>
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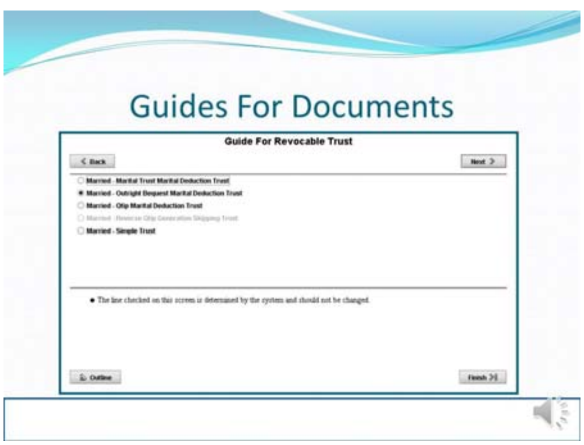

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<td>The Diagram module of DPS even provides me with indications as to which guides I should use when it is time to create the other legal documents, such as the Will or Revocable Trust.</td>
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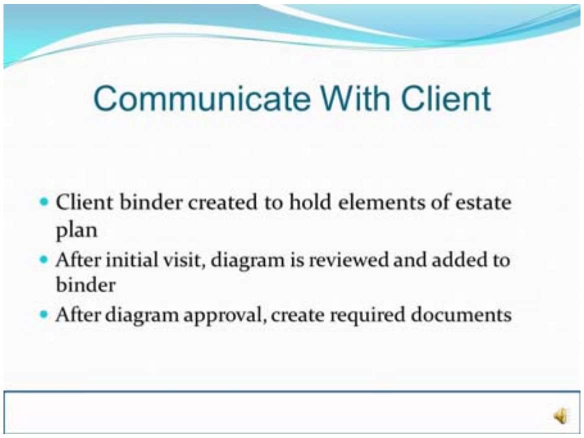
<td>
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<td>Once the client has reviewed the Diagram and approved it, I then prepare the actual legal documents. This is done very quickly because I know which guide to use and all previous information entered when creating the Diagram is linked automatically into the Will, Revocable Trust and Powers.</td>
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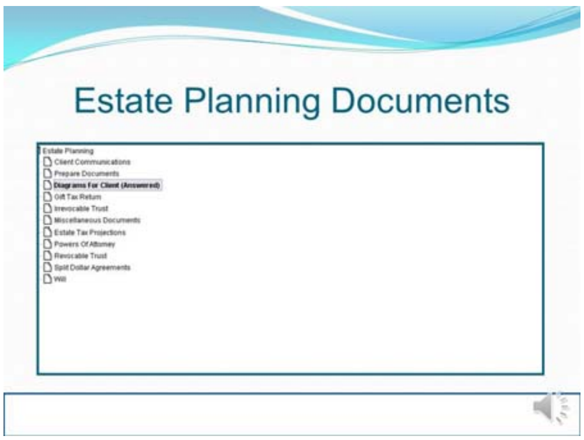
<td>
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<td>When I open DPS, I select the client file used to create the Diagram, then click through a few screens in the Will, Revocable Trust and Powers modules and click on the Produce button to create each of the final legal documents.</td>
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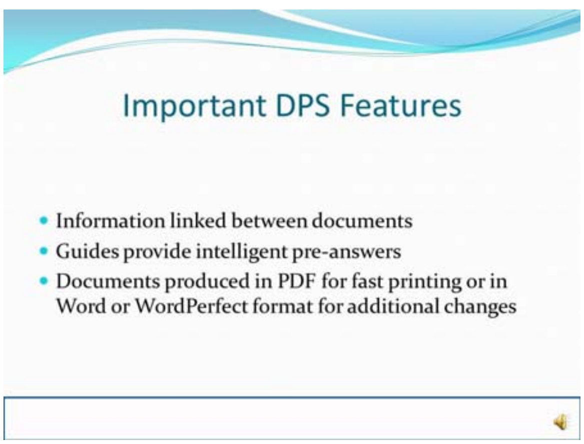
<td>
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<td>I have already mentioned that DPS links information between documents so that client and document information is only entered once. Likewise, I've discussed how guides improve efficiency, providing intelligent pre-answers. Most Wills and Revocable Trusts can be completed entirely in DPS. It is important to realize that DPS is also flexible. If there are some truly specific changes that need to be made, DPS can provide a Word or WordPerfect file that allows for additional changes.</td>
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<td>When all documents are completed, I email or mail them to the client for final review using the letters generated in the DPS Client Communication module. After the client reviews the documents and is satisfied that they convey his desires, he calls me to schedule an appointment for the execution of the estate planning documents, and the project is completed.</td>
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<td>With the addition of Diagrams and Client Communication to DPS, my estate planning practice has become more efficient and more effective with improved client communications. Using this technique I can complete an estate plan for a client in substantially less time, thereby making my practice more efficient and significantly reducing turn-around time for the client. All of the tools that enable me in my practice are now available in DPS. As always, call us if you need further explanation or training. What has worked in my practice can work for you, too!</td>
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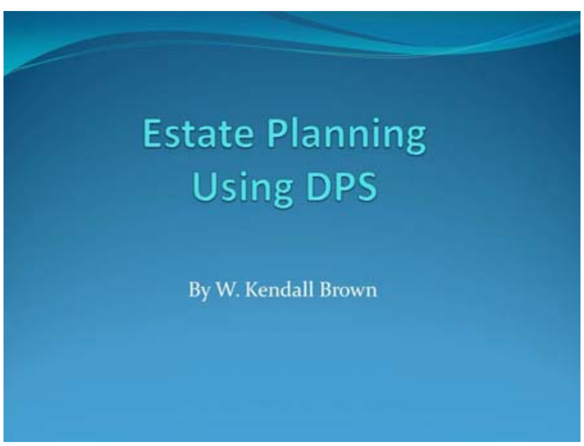
<td>
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