

Drafting Wills and Trusts with WinDraft

**September 13, 2008, San Francisco
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1. The WinDraft interface.

Designed for people who are interested in working fast. You can start with a pattern answer file, load, make changes, and "Blast Off!" (Demo) (See Quick Start to Using EP Expert, attached.)

2. The WinDraft difference.

Designed for large firms and boutique practices, it combines the best of both worlds:

- a. One point data entry—the most expensive of all computer functions is data entry. WinDraft has a one point data entry for ALL documents that are prepared as part of a transaction. Many documents can be prepared from that one data entry checklist, eliminating the costly re-entry or cloning of data. This one point data entry feature saves significant expenditures in time and money. It also reduces the opportunity for error.
- b. A "starter kit" with pre-programmed structure for solving common estate planning document drafting issues, including handling of fiduciaries, personal pronouns, advanced use of Microsoft Word features, and structure of documents with common clauses.
- c. Because of the starter kit approach, you have a “pre-fabricated” document assembly structure instead of just “hammers and nails” as in other document assembly programs. We have pre-written and pre-tested over 3,000 variables and 3,000 IF-ELSE-ENDIF logic statements that are proven to work correctly.
- d. You can use your own forms! Our starter kits allow you to use simple word processing to cut and past your own language into tried, tested, and proven logic statements. This saves you hundreds, if not thousands of hours, in getting your own forms working efficiently in document assembly.
- e. Based entirely in MS Word. No special programming languages need to be learned. WinDraft has only 15 programming commands, and only 10 of those are used about 97% of the time. It is an add-in to Microsoft Word.

- f. WinDraft integrates with Excel, Access (and SQL databases), PowerPoint, and other applications. For example, after merging an entire estate plan for Husband and Wife, WinDraft can prepare a PowerPoint presentation to explain the documents to the client.
 - g. WinDraft integrates with document management systems, including the storage of data entry files. WinDraft can even automatically fill out the document profiles of many documents merged at one time in document management systems.
 - h. The checklist can also make basic math, date, and algebra calculations, and more complex calculations can be done in Excel and the results seamlessly imported back into the merged documents.
3. **Old and New.**

Created in 1993, and upgraded with each version of Word, WinDraft/EP Expert has been helping estate planners for 15 years.

We have starter kits for Estate Planning (for common law and community property jurisdictions), Bank Loan Agreements, Pension and Profit Sharing Plans, LLC and Limited Partnerships, Automobile Accident Defense, and Divorce.

We have created a Word 2007 version that fully takes advantage of the advanced Word 2007 ribbon and tab interface. (Demo)

4. **EP Expert/EPPeople fiduciary roles module.**

EPPeople handles people, roles, and personal pronouns in a way that is fun, sophisticated, and easy.

Easy drag-and-drop interface for assigning people to roles. (Demo)

Predefined variable names for each fiduciary role in each document, for each person at each level. .

Automatically handles all personal pronouns, verb agreement, etc. for a man, woman, corporation or plural in any role at any level.

It's easy to understand when you read the templates, and you don't have to reinvent the wheel to get there

4. **We offer a complete "full service" approach.**

Not only do we publish and support the software, we also provide training by experts in Tax and Estate Planning, Word, and Document Automation.

We will give you a quote to convert your forms and create a turn-key solution for you, or we can train you and support you as you do it yourself. (Most often we do something in between, where we jump-start the process by doing a turn-key for the most-commonly used forms and variations, and train your staff how to take it from there. But we are happy to do it all if you want.).

Attached:

- EP Expert Brochure
- Quick Start to using EP Expert
- 21 Tips for a Successful Document Assembly Program
- Articles: Hodges and Havens, "Deftly Drafting Estate Planning Documents", Property and Probate, July 2004

For more information, contact:

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