



# EP Expert™

## The Premier Estate Planning Practice System for Attorneys

EP Expert is a practice system for estate planners. It's for you if you want a sophisticated Windows-based document drafting system to quickly and easily:

- Draft trusts, wills, powers of attorney, and supporting documents
- Use the system's model documents or use your own language in a highly flexible, custom system
- Minimize non-billable attorney time to create, test and document the system
- Print the lawyer's outline checklist, complete with data
- Integrate with Document Management, and other Windows programs

*For use with Microsoft Word*



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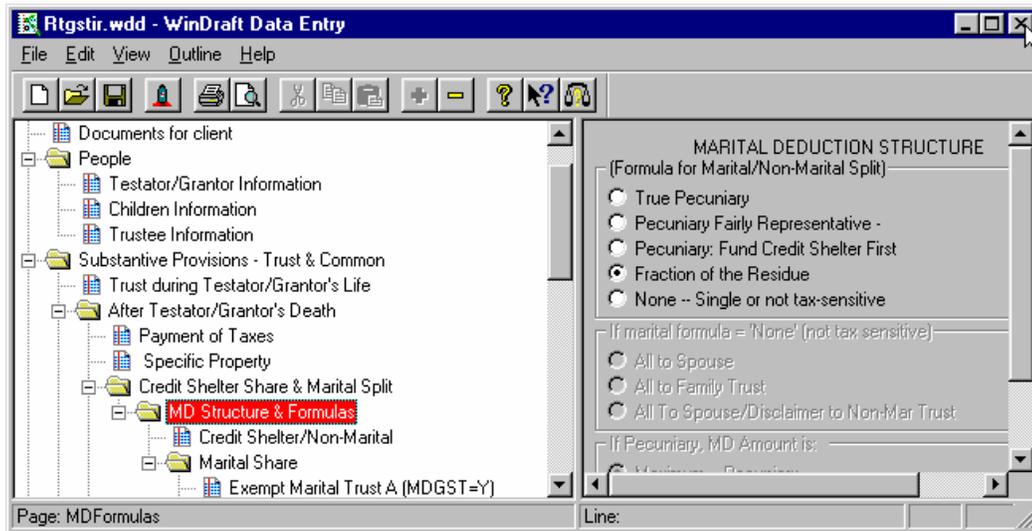
**Microsoft®**  
CERTIFIED

Partner

# The EP Expert Planning Interface

## See the Forest and the Trees

EP Expert provides a front-end letting you use your mouse to click through options in an estate planner's outline of facts and legal issues. Wording and questions can be customized to meet your firm's needs, with most options allowed by state and federal law *already included*.



As you navigate through the outline on the left panel, the right panel dynamically changes. As you select options that make other questions irrelevant, the irrelevant questions are “grayed out.”

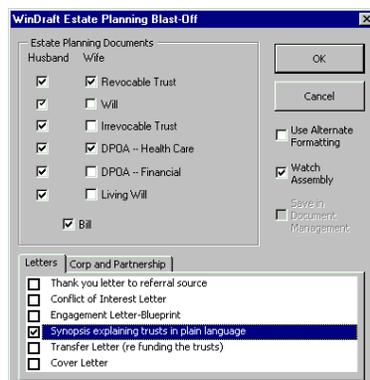
The lawyer can see all pertinent issues without needing to tediously answer questions one at a time.

Favorite patterns can be saved, eliminating the need to wade through all questions when the answers are usually the same. Simply load your favorite answer file, make changes that apply to the current client and click the blast-off button. It is also easy to revise documents, by locating the target area of the outline, and changing the data.

Better yet, print the checklist to get hard copy of all the answers. When reviewing a 30-page trust, the attorney can easily see what decisions have been made by looking at the checklist. The printed outline can be kept with the documents for review and for use as an audit trail.



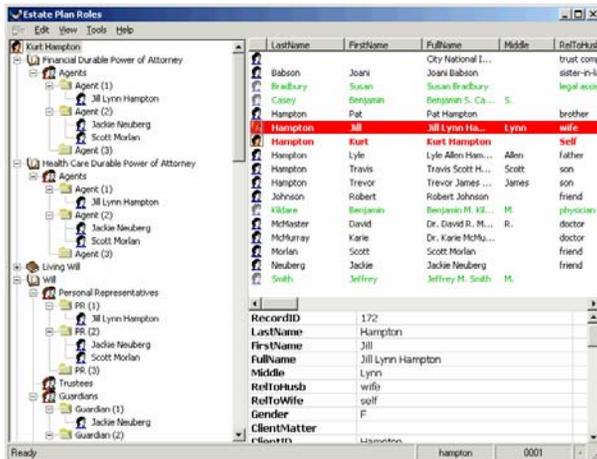
## EP Expert automatically handles mirror images and joint trusts



EP Expert automatically handles gender changes when you draft documents for a man, woman, or both, or for a *joint trust*, including:

- **pronouns** (he/she, his/her)
- **terminology** (wife/husband, testator/testatrix)
- **exceptions** to the “Mirror image” rule (names of trustees and gifts of tangible property)

## “Drag and Drop” interface to enter the “cast of characters”



EP Expert now features “EPPeople,” a user-friendly “drag and drop” interface to let you manage the people in an estate plan and assign them to roles in the documents.

- **No redundant data entry**
- **Easy to use and see the “big picture”**
- **Flexibly handles all initial and successor fiduciary appointments**

## EP Expert exploits the power of your word processor

EP Expert makes use of all the features of your word processor, offering three key benefits:

- **Model form documents are easy for attorneys to read and use.** EP Expert uses fields within your document to change gender (he/she, wife/husband) and trust/will terminology in a way that hides the complexity from the user.
- **Final documents look great.** EP Expert uses advanced features of Word for consistent headings, formatting, paragraph numbering, cross-referencing, and table of contents.
- **Final output is a Word document.** Familiar to your support staff. It can be edited, saved or printed just like any other document

## EP Expert organizes documents with no redundant forms

Model documents are organized so that each one is a “shell” with its own beginning and end. They share a common model document in the middle that contains the substantive clauses. As changes in the law or drafting style require modification, making a change in one place has a “ripple effect” through all documents.

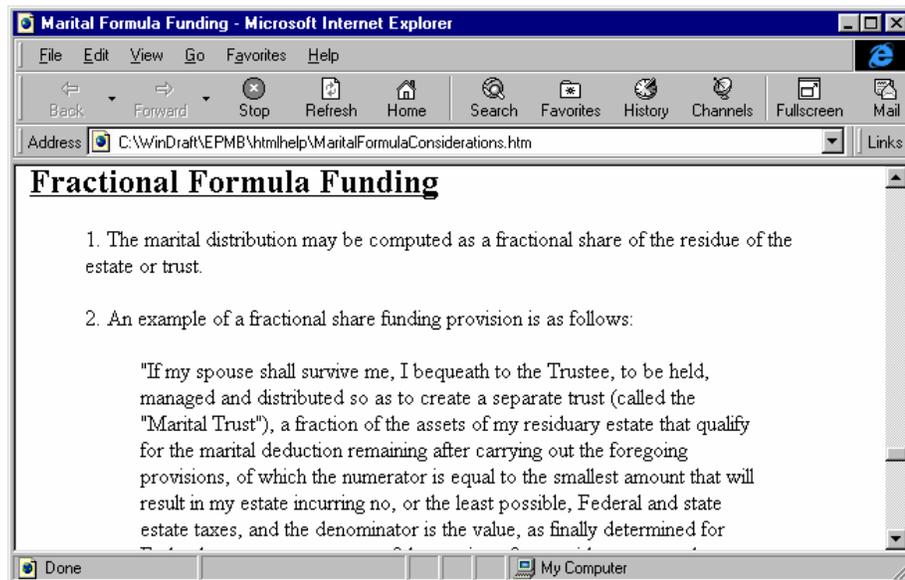
## EP Expert integrates well with DOCS Open and iManage document management

EP Expert’s underlying “engine” (WinDraft) optionally integrates with DOCS Open and other document management software in two ways:

- Data files are managed by DOCS Open or iManage, so that File Open and File Save use your document manager just as with other applications.
- EP Expert includes an automatic PROFILE command. When you merge documents for the husband and wife, each document is automatically saved in DOCS Open, complete with individual profiles with information customized to the grantor/testator of that document, including a unique abstract that describes the provisions in the document.

## Legal Help with your Web browser

The system includes context-sensitive help for any question, which you can modify to suit your needs. The help can be any "Web page" on your local machine, your network, or the World Wide Web.



# At Eidelman Associates, We Understand Estate Planning

## EP Expert contains up-to-date model documents

EP Expert comes with the following documents:

- Revocable Trust – joint, single, and mirror image married -- credit shelter, four alternative marital formulas, marital outright, QTIP, or POA, GST provisions, separate shares or POT for next generation, outright gifts or gifts in trust, sep. trusts with diff. terms for diff. beneficiaries
- Wills – outright gifts, disclaimer trusts, pour-over, full testamentary trust(s) with marital, GST, etc.
- Irrevocable Life Insurance Trust – single or joint lives, first or second death, Crummey provisions
- Powers of Attorney – financial and health
- Many extra documents, including synopsis and engagement letter, community property agreement (if needed), bills of sale, and certificates of trust.

These documents will be continually reviewed and revised to reflect changing federal law or regulations, or new estate planning techniques, and provided to clients who have subscribed to this service.

The staff at Eidelman Associates will help to make any state-specific changes to these documents, or even to integrate your existing documents with EP Expert. They will help make EP Expert work for your firm.

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