



Texas Estate Planning Library

PROBLEM:

The single largest time killer and money drain in a law office is paperwork. It's the biggest obstacle to expanding your caseload and increasing your revenue – without having to work longer hours or adding staff to your payroll.

SOLUTION:

ProDoc forms for Texas attorneys.

Automated *ProDoc* forms help you efficiently handle your paperwork, increase profits, and become more competitive – without adding staff or long hours to your workday.

The *ProDoc* forms system completes repetitive and mundane paperwork for you – from automatically populating client and case information, to merging data, and more.

Using *ProDoc* forms, your office can literally complete twice the documents in half the time. With that kind of speed and accuracy, you can:

> INCREASE YOUR REVENUE WITHOUT ADDING STAFF

With *ProDoc* forms, you can handle more clients without hiring more employees or working longer hours.

> ADD NEW AREAS OF LAW TO YOUR TEXAS PRACTICE

You don't need to spend hours researching and creating documents from scratch. Just add *ProDoc* forms for different areas of law to your subscription anytime.

> AVOID ERRORS AND MALPRACTICE EXPOSURE

ProDoc forms are constantly updated to ensure you always have the most current forms available.

ProDoc forms are easy to use right out of the box, and free customer support is available when you have questions.

See for yourself how *ProDoc* forms can improve efficiency and profitability in your Texas practice. Ask your West Representative for a free, no-obligation demonstration in your office today.



PRODOC TEXAS ESTATE PLANNING LIBRARY VOLUMES

- Attorney-Client Matters
- Guardianship
- Lipman's Wills & Trusts
- Probate
- Small Estate Wills

Optional add-on volumes include:

- Federal Criminal Defense
- *ProDoc* Small Office Suite (SOS®)

To order or for more information, contact your West Representative, call **1-800-759-5418**, or visit www.prodoc.com.



ProDoc Texas Estate Planning Library

The Texas Estate Planning Library includes the following forms volumes:

Attorney-Client Matters

This volume comes standard with every ProDoc subscription and includes more than 30 forms for communications with clients.

NEW CLIENT FORMS

Forms for gathering information about your client and for providing the client with information about your services.

LETTERS

Letters commonly used for:

- Case referral
- Settlement offers
- Notice of a conflict of interest
- Confirmation of decision not to contest pending motion
- Withdrawal

FEE AGREEMENTS

Agreements for hourly, contingent, and pro bono clients, including billing slips and fee statements.

RELEASE AND CLOSING FORMS

- Settlement disclosure statement
- Release
- Billing slip
- Fee statement
- Client satisfaction questionnaire

Guardianship

This volume provides more than 100 automated forms, including inventories and annual accountings, which you can use to manage the ward's estate from inception of the guardianship to final closure.

Lipman's Wills & Trusts

From simple wills to the most complex trust and estate planning, *Lipman's Wills & Trusts* is an exceptional estate planning resource.

Authored by Ronald L. Lipman, this forms volume makes it easy to simultaneously draft generation-skipping, tax-planned wills and revocable trusts, family limited partnerships, financial powers of attorney, medical powers of attorney, directives to physicians, life insurance trusts, and more. *Lipman's Wills & Trusts* provides high-end documents, as well as the forms you need for everyday client matters.

Experienced attorneys specializing in estate planning will value the breadth of this system, while attorneys who are newer to estate planning will appreciate the automated prompts that alert them to often overlooked yet important facets of a client's situation.

LIPMAN'S WILLS & TRUSTS INCLUDES FORMS FOR:

- Wills
- Revocable trusts
- Supporting documents
- Irrevocable trusts
- Buy-sell agreements
- Pre- and post-marital agreements
- Family limited partnerships
- Miscellaneous letters and more

> Ronald L. Lipman is Board Certified in estate planning and probate law by the Texas Board of Legal Specialization.

Probate

Access more than 200 automated forms in this volume to initiate and manage the probate process from the application to probate through distribution of assets and closure of estate administration.

FORMS COVER

- Information gathering
- Independent administration
- Dependent administration
- Heirship proceedings

Small Estate Wills

Get all the forms you need to represent clients with smaller estates – generally those that do not require sophisticated tax planning. Includes more than 40 automated forms for creating basic estate planning documents, including:

- Wills
- Directives to physicians
- Living trusts
- General and medical powers of attorney

> If you represent clients with more complex estate planning issues, see *Lipman's Wills & Trusts* volume.

TEXAS ESTATE PLANNING LIBRARY – ADD-ONS

You can customize your library with the following ProDoc add-on volume:

ProDoc Small Office Suite (SOS)

This back-office management system can be fully integrated with any of your other ProDoc volumes. SOS simplifies all of these important practice management functions:

- Calendars
- Time and billing
- Client and case organization
- Contact management
- Document management
- Client and case notes

GET MORE OUT OF YOUR SUBSCRIPTION

FREE TRAINING AND CUSTOMER SUPPORT

Although ProDoc is intuitively easy to use right out of the box, free training gives you valuable shortcuts and highlights additional functionality to help you get the most out of your ProDoc forms.

Your free training is customized to the forms you use and the areas in which you practice. Free customer support is also available to answer any content and technical questions you may have.

> FOR FREE TRAINING, contact your West Representative

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