

**Electrifying Your Performance:  
Technology in an Estate Planning Practice**

**By Jason E. Havens**

To be presented at the Knoxville Estate Planning Council on March 15, 2007.

**Outline:**

**Overview: How Technology Can Help the Estate  
Planning Practice**

*Consistency*

*Teaching tools*

*Document/knowledge management*

*Organization*

*Time management*

*Billing, collections, accounting and performance reports*

*Efficient research and updates*

**Survey of Estate Planning Technology and Tools**

*Drafting systems for tax and estate planning lawyers*

*“Expert” systems*

*Drafting Wills and Trust Agreements*

*Lawgic*

*WealthDocs*

*Wealth Transfer Planning*

*“Do-It-Yourself” systems*

*HotDocs*

*GhostFill*

*Calculations and illustrations for estate planners*

*NumberCruncher & Estate Planning QuickView*

*Kugler Estate Analyzer*

*CCH’s ViewPlan Advanced*

*Intuitive Estate Planner*

*SmartDraw Legal Solution*

*Word processing and office productivity suites*

*Microsoft Office 2003*

*Corel WordPerfect X3*

*OpenOffice*

*Document/knowledge management*

*Document Managers*

*Corel WordPerfect’s QuickFinder*

*Tools within practice management programs*

**Local search tools**

**Google Desktop**

**X1**

**Microsoft Windows Desktop Search**

***Practice (or "case") management systems***

**PracticeMaster/Tabs3**

**TimeMatters/BillingMatters**

**Amicus Attorney & PCLaw**

**Timeslips**

***Estate planning research***

**BNA Tax Management Portfolios**

**Loislaw**

**Trusts & Estates magazine**

**Leimberg Information Services, Inc.**

**Estate Planner's & Administrator's Discussion List**

**Wills, Trusts & Estates Prof Blog**

**Planned Giving Design Center**

**Florida Bar Journal**

**Michigan Probate and Estate Planning Journal**

**Wealth Manager**

**Amazon.com**

***The mobile estate planning practice***

**Remote Access (secure): LogMeIn**

**Smartphones: Treo 600/650**

**Sony digital recorder**

**Plaxo**