

wills, the simple way.



BC ESTATE PLANNING
by **eemergent**

Do Process is excited to share our partnership with Emergent to bring you BC Estate Planning: a Wills solution that is integrated with ProSuite™. BC Estate Planning is a user-friendly software solution designed specifically for British Columbia legal professionals that is revolutionizing the way Wills, Personal Directives and Representation Agreements are prepared within the legal office.

BC Estate Planning was developed by experienced legal professionals to be much more than a “precedents on disk” program. It collects information you enter to be used in automating the creation of any estate planning document so that you can have a first draft ready in minutes. Enhance your relationships with your clients, improve collaboration and build loyalty all with one simple program.

rethink wills.

BC Estate Planning is simple to learn and easy to use.

- Speed up the process of gathering information from your clients with the web-based *Legal Intake for Wills*
- Simplify the preparation of comprehensive, high quality Wills, Personal Directives and Representation Agreements
- Fewer operations required to perform routine tasks saving time and reducing duplication
- Send customized letters to clients affected by changes in legislation
- Easy customization of documents
- Includes comprehensive support, upgrades and training



“Do Process excels at making life easier, and that is what it is all about, saving time, saving hassle, and getting the job done.”

Zena Langendoen,
Law Assistant

Automated Expertise

Boost productivity – Automate the creation of your estate planning documents to efficiently prepare Wills, Personal Directives, Representation Agreements and more. BC Estate Planning guides you through the process with ease to select clauses and produce a first draft within minutes. Obtain expert mirrored documents with just one click. Enter data once and all of the necessary documents will automatically be produced.

Comprehensive File Management

Keeping your customers up-to-date – Accurately track clauses contained in executed documents making it simple to know which clients are impacted by legislation changes.

Keep in Touch

Easily generate a report of all clients who have not updated their Wills recently and send a follow up letter to each suggesting a review of their Wills.

Quickly Gather Customer Information

Save time and reduce errors – Have your clients complete a web-based *Legal Intake for Wills* form and easily import the information into your BC Estate Planning file matter. We provide you with your own unique website and all the tools needed to allow you to brand the site to match your firm's style. You also have the flexibility to customize the wording of the questions as well as the *What is This?* for each question.

Your clients can complete this form on any computer or mobile device and the information they input can then be automatically imported in BC Estate Planning, reducing errors and saving you valuable time.

Integration with ProSuite

Integration with the ProSuite conveyancing program allows you to import existing client information to save time and reduce manual entry errors.

Stay Up to Date with New Information

New content released by the CLEBC and BC Notaries will be regularly added to the program.

Customizable Will Clauses

Enjoy the flexibility to create your own customizable will clauses by editing existing clauses or adding new ones. To ensure easy customization, these clauses come complete with all the necessary formatting to ensure that a professional, fully formatted Will document is produced.

You can also select clauses from the BC Notary Content, the CLEBC Content or your own customized content. Clauses can be selected from any of these sources, input into your Will document and easily reordered. To save even more time, quickly and easily create a favourite from the clauses selected and with just a few clicks use that favourite in any file!

**Ask us about other
Do Process solutions**

ProSuite – do real estate (simply)