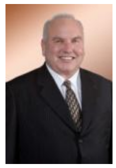
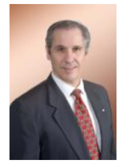
Company History | Backgrounder


Bill Conway


Ed Dean


Stan Miller


Peter Parenti


Tom Ray


Roberta Trudeau


Carl Waldman


Dennis Brislawn


Lew Dymond


Scott Schrader

The story of WealthCounsel is a story of how nine practicing attorneys working together as colleagues – not as competitors – created the most cutting-edge document creation system in the estate planning field. They believed that no matter how much expertise and professional knowledge one has in his or her field, that financial success ultimately depends upon how efficiently, quickly, and accurately the practitioner can produce quality legal documents.

Recognizing that there was no document creating system commercially available to meet their needs, these nine attorneys – who became the founders of WealthCounsel – created an open architecture system using two commercially available software applications: HotDocs for the document assembly engine, and Microsoft Word for word processing.

WealthDocs Version 6.2 is the result of that collaboration. As WealthCounsel membership continues to grow, new members contribute their expertise for the benefit of their brethren – one of the unique characteristics that sets WealthCounsel apart from its competitors.

The original nine partners were William A. Conway, W. Edward Dean, Stan Miller, Peter J. Parenti, Thomas J. Ray, Jr., Merek Rubin, Roberta J. Trudeau, Carl Waldman and Jeffrey Zabner.

These individuals came together as friends and colleagues from their involvement in another legal software-services company beginning in 1990 through 1997. The initial partnership was called ***The Jackson Group*** with articles of incorporation filed in the State of Arkansas in July, 1997. Their initial purpose was to collaborate on large estates of $25 million and up – with each attorney providing their area of expertise both in legal-technical knowledge and legal documents they had drafted. Roberta J. Trudeau was the only non-attorney and provided marketing and management support. Each attorney partner continued their separate practices full time as estate planning specialists.

In 1998, the partners formed the ***National Study Group*** – an educational forum for advanced practitioners to learn from leading experts in various areas of trusts and estates law. Also in 1998, C. Dennis Brislawn became the 10th principal. Eventually, the group added additional CLE courses taught by the principals of The Jackson Group. This expanded their initial audience of 50 National Study Group members to several hundred attorney colleagues including Lewis W. Dymond.

1999-2000 was a critical transition period for The Jackson Group when it changed its focus and name to WealthCounsel, LLC. During that period, two partners resigned – Merek Rubin and Jeffrey Zabner.

The principals of WealthCounsel recognized a need within their own practices for a comprehensive automated drafting system that was constantly updated to reflect changes in the law and advanced planning strategies. Lewis W. Dymond, an attorney who had attended WealthCounsel, urged the company to create such a system. Having a strong technology background, Lew Dymond set out to create the first formal version of WealthDocs using an industry standard – HotDocs as a software program and engine and Microsoft Word – the leading word processor.

Lew served as CEO from 2000 to 2006 and became a full partner in 2005. Scott Schrader, the lead force and architect of the Revocable Living Trust System, became the ninth full partner in 2001.