WealthCounsel®

WealthDocx® Is Available in *CORE, ADVANCED,* and *COMPLETE* Editions

Drafting solutions engineered for your practice needs. Become a WealthCounsel Member and choose the drafting system that's right for you!

A SCALABLE DRAFTING SYSTEM CUSTOMIZED TO YOUR PRACTICE!

	Core Edition	Advanced Edition	Complete Edition
Document Assemblies Included	• Client Letters to manage client engagements; • Comprehensive Living Trust System (with Ancillary Documents); • NEW "Simplified" Living Trust; • Comprehensive Will System (with Ancillary Documents); • State Specific Templates The ***Core*** system provides the tools that EVERY estate planning client needs, and is the right foundation for every estate planning practice. ***Note:*** *The Core Edition does not include the Domestic Asset Protection Trust, a new feature included in* ***"WealthDocx 7."***	• Comprehensive Irrevocable Trust System; • Split Interest Trust System; • Charitable Planning System; • Special Needs Trust System; • Retirement Planning System; • Family Limited Partnership System; • Limited Liability Company System; • Business Succession Planning System; • Delaware Domestic Asset Protection Trust; • Physicians Planning Module	The ***COMPLETE*** Edition includes both the **Core Edition Systems** and the ***Advanced Edition Systems***.

NOTE: All 3 Editions include/integrate with The WealthCounsel Asset Transfer System (WDATS) at no extra charge. WDATS works natively with WealthDocx answer files, and facilitates transfer from any person, trust or entity to any person, trust or entity.

	Core Edition	Advanced Edition	Complete Edition
Practice Profile	• Foundational practices focusing on preparation of living trusts and wills • Growing practices seeking to expand planning options in trust- and will-based planning	• Advanced practices emphasizing sophisticated gifting, charitable planning, and specialized strategies • Practices that serve business owners and professionals	• Practices that provide comprehensive estate planning services to a wide range of clients with diverse planning needs

Scalability

- Any member with the ***Core Edition*** or ***Advanced Edition*** may upgrade to the ***Complete Edition*** at any time by paying the difference in initiation fee and by restarting a 12-month membership period. *(See the accompanying* ***FAQ*** *for other special requirements when changing between systems.)*
- Members with the ***Core Edition*** may establish co-counsel relationships with members who have the ***Advanced Edition*** or ***Complete Edition*** to assist with engagements requiring advanced strategies and document assemblies.