WealthCounsel | BUSINESS DOCX®

Document Solutions Included

Client Intake and Communications

- Client Intake Worksheet
- Initial Meeting Letter
- Engagement Letter
- Annual Legal Audit: Client Worksheet
- Year-End Planning: Worksheet
- Tax Time: Worksheet
- Employee Benefits: Worksheet
- Insurance Coverage: Worksheet
- Legal Maintenance Plan

Formation and Startup Suite

- LLC Formation - Preliminary Checklist
- LLC Formation Document
- Operating Agreement
- Operating Agreement: Memo to File
- Operating Agreement: Executive Summary
- Partnership Formation Document (Certificate of Partnership)
- General Partnership Agreement
- Partnership Formation Document (Certificate of Limited Partnership)
- Limited Partnership Agreement
- For Profit Corporate Formation Document (Articles of Incorporation)
- Non-Profit Corporate Formation Document (Articles of Incorporation)
- Agreement to Form Corporation
- Bylaws

General Operations

- General Operations
- Minutes and Resolutions
- Independent Contractor Agreement
- Employment Agreement
- Employee Handbook
- Employee Counseling Statement
- Performance Review and Planning Form
- Deferred Compensation Agreement
- Non-Disclosure, Non-Competition, Non-Solicitation Agreement
- Equipment Lease Agreement
- Simplified Commercial Lease

Mergers, Acquisitions, and Buyouts

- Buy-Sell Agreement
- Equity Purchase Letter of Intent
- Equity Purchase Agreement
- Pledge Agreement
- Asset Purchase Agreement
- Legal Due Diligence Checklist
- Entity Conversion Suite

Attorney Guides and Resources

- Choice-of-Entity Decision Guide (Tax Considerations)
- Choice-of-Entity Decision Guide (Non-Tax Considerations)
- Directory of State Filing Agencies
- Buy-Sell Agreement Drafting Checklist
- Buy-Sell Agreements and Related Tax Issues
- Directory of Conversion Statutes

As you know, small and mid-sized business clients require specialized, customized documents they can understand. Unfortunately, those documents aren't always easy to draft—unless you have Business Docx. Business Docx is the perfect solution for creating beautifully tailored and accurate documents with confidence and speed. You'll demonstrate your legal expertise and your business savvy—which your clients will surely appreciate.

You Get

- Business planning software that's intuitive and helps you learn as you're drafting
- A robust library of business plan templates for a variety of business clients
- Peace of mind knowing all legal and regulatory changes are automatically updated for you
- Built-in task management, research and business succession planning tools
- Client-friendly executive summaries (Buy-Sell, LLC, etc.)
- Contextual help, legal citations, and expert commentary to guide you through drafting
- Confidence that your documents are current, accurate and polished

Your Practice Gets

- Increased efficiency by eliminating costly, time-consuming manual drafting
- More time and bandwidth for new legal services and new clients
- Built-in help for staff to learn and develop new skills
- Consistent, cohesive, professional looking documents across the firm
- Content developed by expert business attorneys
- A system that helps support staff draft complex documents
- A comprehensive client maintenance program
- Confidence in your business

Your Clients Get

- Documents that are easy to understand and written "in plain English"
- The most up-to-date legal business information
- Faster response time and document delivery
- Consistent, thorough communications
- More of your time and expertise
- Confidence in you

For more information on Business Docx and a membership in WealthCounsel:
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