WealthCounsel | WEALTH DOCX®

CORE EDITION

Imagine thousands of experienced estate planning attorneys, in your office, helping you draft your documents. That's the kind of bench strength you get with Wealth Docx. Created and updated by attorneys for attorneys, Wealth Docx is the best estate planning software for attorneys who want to create accurate, up-to-date and well-informed documents, every time. Your clients will appreciate the difference—and your bottom line will, too.

Will System

Wills with and without tax-sensitive planning
Client portfolio inserts, instructions, and will summaries
Ancillary documents including:
- Durable powers of attorney
- Medical directives
- HIPAA authorization
- Anatomical gift forms
- Affidavits

Living Trust System

Individual, joint & pour over revocable trusts
- Funding instructions
- Comprehensive interview questionnaires
- Estate tax planning including marital deduction planning
  - (including Clayton Election and generation-skipping transfer tax (GSTT))
- Continuing and testamentary trusts for beneficiaries
- Comprehensive charitable planning
  - Testamentary charitable trusts and private foundations
- Trust protector provisions
- Conduit trust provisions for retirement accounts
- Ancillary documents including:
  - Pour-over wills
  - Powers of attorney
  - Property agreements
  - And more!

Client Letter Suite

Spousal conflict waver
Initial client letters
Intake worksheets/comprehensive interview questionnaires
Engagement/disengagement letters
Invoices

Trust Protector Supporting Documents

Approval/rejection of accounting
Exercise of powers documents
Replacement/removal/resignation documents

The Core Edition Will and Trust Systems come in three versions (Quick, Simplified, and Full) of varying complexity and length.

You Get

- Software that is quick and easy to learn
- A suite of dynamic templates vetted by top attorneys
- Automatic software and legal information updates
- Built-in task management and research tools
- Easy-to-access summaries of document histories
- Expert legal education and commentary that teaches you as you go
- Confidence in your documents

Your Practice Gets

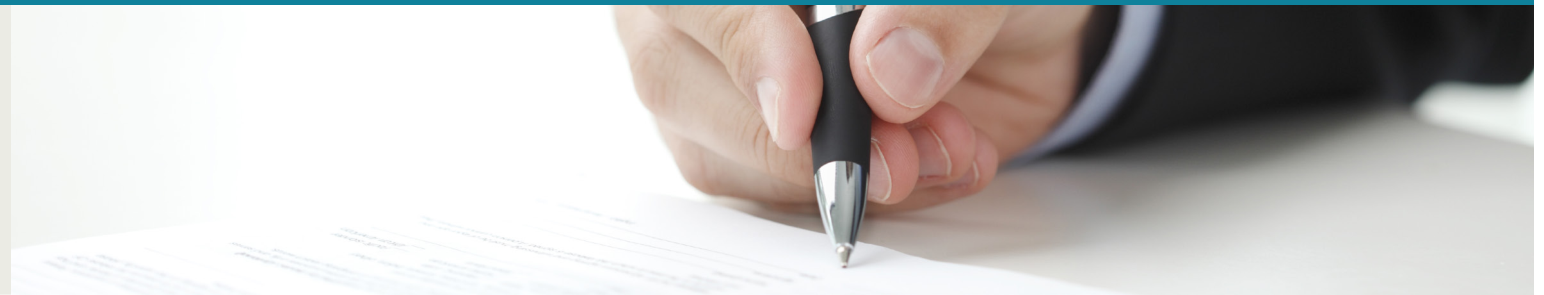
- A streamlined drafting process
- Consistent, professional looking documents across the firm
- A system that helps support staff easily draft complex documents
- A comprehensive client maintenance program
- A sophisticated, polished, reliable image
- Confidence in your business

Your Clients Get

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

For more information on WealthCounsel: information@wealthcounsel.com or call us: (888) 659-4069 #819

COMPLETE EDITION (includes all Core document systems)



Irrevocable Trust System

- Individual and joint Irrevocable Life Insurance Trusts (ILIT)
- Domestic Asset Protection Trust
  - (Alaska, Delaware, Nevada, South Dakota)
- Third-Party DAPT (aka Hybrid Domestic Asset Protection Trust)
- Gifting trust
- Trust protector provisions
- Health and Education Exclusion Trust (HEET)
- Inheritor's trust (BETIR, BDIT, BDGT)
- Intentionally Defective Grantor Trust (IDGT)
- IDGT gift and sale documents
- 2503(c) Minor's trust
- Ancillary documents including:
  - Certificate of trust
  - Demand right notification
  - Trustee resignation and removal
  - Promissory note
  - Client letters and enclosures
  - And more

Charitable Planning System

- Charitable remainder trusts (CRAT, CRUT, NICRUT, NIMCRUT, FLIP-CRUT)
- Charitable lead trusts (CLAT, CLUT)
- Private foundations – corporate and trust
- Ancillary documents including:
  - Gift agreements
  - Gift annuity agreements
  - Life estate reserved deeds
  - Maintenance and ownership agreements
  - Certificate of trust
  - And more

Retirement Planning System

- Stand-Alone Retirement Trust
  - (Conduit, Accumulation, or "Switch" trusts)
- Retirement plan beneficiary designations
  - (Including IRA beneficiary designation and qualified plan designation forms)
- Ancillary documents including:
  - Certificates of trust
  - Funding instructions and forms
  - Operating guidelines
  - Client letters
  - And more

Qualified Terminable Interest Property (QTIP) Trust System

- Lifetime QTIP trust
- Ancillary documents including:
  - QTIP certificate of trust
  - Trustee removal and replacement
  - And more

Qualified Personal Residence Trust (QPRT) System

- Qualified Personal Residence Trusts (QPRT)
- Ancillary documents including:
  - QPRT certificate of trust
  - Trustee removal and replacement
  - And more

Grantor Retained Trust (GRT) System

- Grantor Retained Trust (GRAT, GRUT, GRIT)
- Ancillary documents including:
  - GRT certificate of trust
  - Trustee removal and replacement
  - And more

Family Limited Partnership System

- Entity formation documents
- Partnership agreement
- FLP gift and sale documents
- Funding and transfer documents including:
  - Private annuities
  - Self-cancelling installment note
  - Assignments
- Correspondence templates and design checklists
- Ancillary documents including:
  - Client letters
  - And more

Limited Liability Company System

- Entity formation documents
- LLC operating agreement
- Funding and transfer documents
- Ancillary documents including:
  - Client correspondence templates
  - Solvency certificate
  - Organizational meetings
  - And more

Business Succession Planning System

- Buy-Sell agreements
- Employee purchase and bonus
- Stay bonus
- 83(b) Election
- Ancillary documents including:
  - Deferred compensation agreement
  - Top Hat IRS letter
  - And more

Supplemental Needs Trust System

- Individual or joint Supplemental Needs Trust
- Ancillary documents including:
  - Memorandum of intent
  - Certificates of trust
  - And more

Physician's System

- Domestic Asset Protection Trust
  - (Alaska, Delaware, Nevada, and South Dakota)
- Administrative services agreement
- Practice buy-in agreement
- Equipment lease
- Physician employment agreement
- Premise lease agreement
- Transmutation agreement waiver