

Tech Audit
DRUDGERY-FREE ESTATE PLANS
West's Wills and Trusts Software Is Worth the Purchase Price*

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TAKING THE DRUDGERY OUT of knowing the law applicable to a document--and being able to mechanically assemble appropriate words and paragraphs--is the promise that document assembly has dangled before us for years. And though there has been much progress, for most lawyers the promise is still largely unrealized.

The reasons why document assembly is not ubiquitous probably include the time it takes to set up even a simple system, the daunting effort to establish a complex system, and the difficulty of assimilating a system set up by someone else.

Document assembly is well-suited in areas that include short documents that have the same fields every time you do them, along with some boilerplate and varying specific information. Examples include deeds, simple real estate contracts and dissolution-of-marriage petitions.

But so long as the logic can be defined (some may call it a decision-tree process), document assembly can also be a lifesaver for complex documents, such as those effecting a complex estate plan.

West has a winner with Drafting Wills and Trust Agreements. Priced at a little less than \$900 per year, it is a bargain even for a solo practitioner who does just a few complex estate plans a year. DWTA is regularly upgraded, and it stops working when the license expires.

West says that, at least up to a point, its help-line research attorneys will assist with substantive decision-making regarding how to use the program in certain situations. It also has an 80-page manual.

IT REMEMBERS

DWTA HAS CHECKS THAT WARN OF CONFLICTING PROVISIONS. Enter information once (a simple example is client data) and the program remembers it. There is built-in analysis and help. Customized paragraphs are easy. And the program not only generates final documents, like trusts and complex wills, it also generates a document explaining why things were done the way they were.

The program makes the life of a seasoned estate planner easy, and it jump-starts the career of an up-and-coming estate planner. You do need to know something about estate planning to have a sense of what to do, but DWTA becomes your knowledge base--always there, never forgetting and regularly updated.

To anyone who has crafted such documents from scratch, DWTA is like putting an end to beating your head against the wall. Suddenly you are free to spend time pushing

the edges of thoughtful analysis and advice, rather than focusing on the mechanics of assimilating law changes into documents.

There is a four-volume print set that is a companion to the software. The print set is unnecessary if one has DWTA, but it is a useful additional resource. It contains more explanation and is discounted 50 percent from its \$405 price if purchased with the program.

Still, as good as DWTA's substance is, the program does not have a law degree, nor is it admitted to the bar, so we asked whether West restricted sales to lawyers.

The answer was not in the following words, but it might as well have been: "You pay the price; you get the program." One might argue that it is one thing to sell books on drug manufacturing to the public and another to sell an assembly engine that actually produces prescription drugs. The argument is similar for a book on estate planning and the engine that creates the estate-planning product.

At any rate, DWTA release 3.0 is due out this fall. It will have many useful additions, such as more state-specific forms and a supplemental needs form.

This program is easy to use. If you do estate plans, once you start using this tool, it is likely you will never look back.

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