

Donna S. M. Neff, *JD, CS, TEP*



Donna has practiced law for over 20 years with a focus on wills, powers of attorney, trusts and estates. She is a member of the Society of Trust and Estate Practitioners (STEP) and a Certified Specialist (Estates and Trusts Law).

Before becoming a lawyer, Donna had successful careers in teaching and consulting in the high tech industry. Those careers provided valuable experience for the development of SmartWillPro.

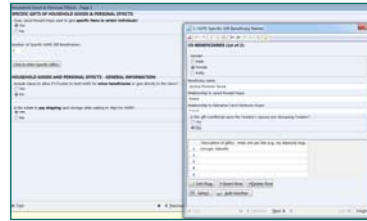
Donna began automating the drafting of wills, powers of attorney, and other documents soon after she became a lawyer. Using her own experience and frustrations with will drafting, Donna developed SmartWillPro which she has continued to refine over the years. SmartWillPro is currently in use by selected law firms in Ontario.

SmartWillPro Process

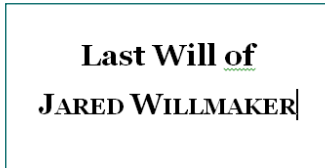


Take client instructions

Enter details in SmartWillPro



Easy-to-use software for drafting simple or complex wills and powers of attorney



Produce Word document

Customize to client's needs

Customization Checklist
Indicate with a checkmark, as each customization is completed. Use a dash to indicate not applicable to the document.

Customization	Will for Spouse	Will for Child	Will for Grandchild	Will for Other	Power of Attorney	Power of Attorney
Customizing will	✓	✓				✓
At least one beneficiary				✓	✓	✓
Power of Attorney				✓	✓	✓
At least one beneficiary				✓		✓
At least one beneficiary		✓				✓
At least one beneficiary						✓



Review and sign

Contact Info

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What is SmartWillPro?

SmartWillPro (SWP) provides estate planning templates designed to assist lawyers and their assistants to quickly and efficiently draft:

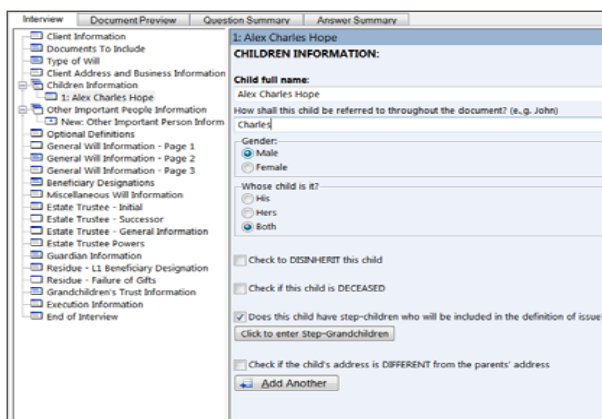
- simple or complex wills,
- multiple wills (primary, secondary, tertiary),
- trusts (within wills) including Henson trusts,
- powers of attorney, and
- related documents, e.g., codicils, affidavits.

SWP is for Lawyers who:

- want to spend less time drafting wills and powers of attorney while increasing accuracy and efficiency,
- don't believe in cookie-cutter wills but still want the time and cost savings that technology offers,
- want non-lawyers (under supervision) doing parts of the work at much lower cost,
- want reduced risk that can result from repetitive information being verified once, not every time it is used,
- want a will/POA drafting tool that allows for review of clients' estate planning goals and tailoring of documents to suit those goals,
- have clients who may need up to four levels of executor or attorney appointments,
- serve families concerned about disability and health issues and who need documents that address those needs,
- want to easily draft multiple wills (primary, secondary and tertiary).

SmartWillPro Features

- ✓ Easy-to-use, does not require specialized computer knowledge.
- ✓ More than 150 built-in clauses allow drafting of documents tailored to client needs.

The screenshot shows the SmartWillPro software interface. On the left is a navigation tree with categories like 'Client Information', 'Documents To Include', 'Type of Will', 'Client Address and Business Information', 'Children Information', 'Other Important People Information', 'Optional Definitions', 'General Will Information - Page 1', 'General Will Information - Page 2', 'General Will Information - Page 3', 'Beneficiary Designations', 'Miscellaneous Will Information', 'Estate Trustee - Initial', 'Estate Trustee - Successor', 'Estate Trustee - General Information', 'Estate Trustee Powers', 'Guardian Information', 'Residue - 11 Beneficiary Designation', 'Residue - Failure of Gifts', 'Grandchildren's Trust Information', 'Execution Information', and 'End of Interview'. The main window displays the 'CHILDREN INFORMATION' form for 'Alex Charles Hope'. The form includes fields for 'Child full name' (Alex Charles Hope), 'How shall this child be referred to throughout the document?' (e.g. John) (Charles), 'Gender' (radio buttons for Male, Female, Both), 'Whose child is it?' (radio buttons for His, Hers, Both), and several checkboxes: 'Check to DESINHERT this child', 'Check if this child is DECEASED', 'Does this child have step-children who will be included in the definition of issue?' (checked), and 'Check if the child's address is DIFFERENT from the parents' address'. There are buttons for 'Click to enter Step-Grandchildren' and 'Add Another'.

- ✓ Optional table of contents in wills.
- ✓ Trusts (in wills) for spouses, children, grandchildren, beneficiaries with disabilities.
- ✓ Outputs to a Word document for further editing and customizing.
- ✓ Templates updated to reflect significant changes in the law.
- ✓ Answer files provide input to user-developed templates.

What does SWP cost?

- Try before you buy: 30-day free trial
- First user at a law firm: \$695 + hst annually
- Other user at same firm: \$495 +hst annually

System Requirements

For PC users:

- Microsoft® Windows® operating system (OS),
- Microsoft Word (2007 or later),
- HotDocs™ software (User or Developer version)*,
- hard drive with sufficient free space (200 MB or more is recommended).

For Mac users, SmartWillPro can be used if Windows is running via an application such as Parallels or the Mac utility Boot Camp. Microsoft Word and HotDocs software must also be running in the Windows environment.

*HotDocs software must be installed before SmartWillPro can be used. One-time purchase cost is \$360 USD for User version or \$720 USD for Developer version (ask us for sources). If there are no plans to develop in-house templates, only HotDocs User is needed.

Cloud Version of SWP?

If SmartWillPro were available as a cloud application, accessible from any internet-connected computer (PC, Mac or other) with no need to purchase or maintain HotDocs software, would you prefer this option?

To express interest in a cloud version of SWP with no obligation, email; donna@donnaneff.com with the subject line "SWP Cloud Version".