

MProvIT™

*Improving Your Practice
with Technology*

WealthCounsel LLC
Strategic Partner

Practice Management with EP-Matters

Wells Anderson

Phyllis Foisie

Seth Rowland

Las Vegas, August 24, 2002

What is MProviT?

- A team of Time Matters and HotDocs Certified Professionals
 - Wells Anderson (Minneapolis, MN)
 - Phyllis Foisie (Portland, OR)
 - Seth Rowland (New York, NY)
- A WealthCounsel Strategic Partner
- A Resource To Improve Your Practice With Technology

Why Are You Here?



Practice Management Means

- Care and feeding of existing clients
- Effective prospecting of new clients
- Consolidation of all matter information
- Consistent, high-quality work product
- Capture more billable hours per week
- Never lose a document again
- Take it on the road with you

Our Game Plan

- EP-Matters, WealthCounsel Edition
 - The best of Time Matters & WealthCounsel
- Time Matters for *your* law practice
 - Hands-on with nationally known AIC's
- WealthCounsel at your finger tips
 - Direct access to templates from TM
 - Document and answer file management
- Benefits of Membership

One Place for Everything

- Your Activities:
 - Appointments
 - Tasks
- Your Clients
- Everyone Else:
 - You know
 - Ever met
 - Would like to meet
- Your Matters
- Your Work Product
 - Sticky notes
 - Phone calls
 - E-mail
 - To colleagues
 - To clients
 - Documents
- Your Billing Records
- Your Invoices
- Your Physical Files

The Power of Relationships

- Everything in EP-Matters is related
 - By links to client and matter on every entry
 - By specified relationships
 - By look-ups
- Everything is accessible
 - The Daily, Weekly, & Monthly Calendars
 - Lists, Quicktabs, Sublists and Reports
 - The Alerts and The Journal

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EP-Matters – Daily Calendar:

Central Place for All Activities

Time Matters 4.0 - EP-Matters BETA - Basha Systems, LLC - [August, 2002 - PAF,SGR,WHA]

File Edit View Calendar Database Mail Billing Report Search Window Process Help

Daily Weekly Events ToDo's Contacts Matters AddEve AddTod AddNot AddDoc Journal Alerts Help

Calendar

Options

8/23/2002 Staff PAF,SGR,WHA

All Staff(G) Firm Litigation Group(G) Partners(G) Phyllis A Foisie Seth G Rowland Wells H Anderson

1 Day 3 Days 7 Days 14 Days Weekly **Monthly**

August 2002

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21			
25	26	27	28			

Aug 23, 2002

- SGR SGR- Prepare Living Will- Alina Estate Plan
- SGR 8:00AM- SGR- Breakfast at Tiffany's- Plan A
- WHA 5:48PM- WHA- First Meeting with Client- Alina Estate P

C:\tmw4sgr\WC SGR [SGR] 6:40AM 8/24/2002

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EP-Matters – Events & ToDo's:

Juggling Appointments & Tasks

The image displays two overlapping software windows from the EP-Matters application. The top window, titled "Event Form - Change", has a menu bar with "File", "Edit", "View", "Process", and "Help". Below the menu bar is a toolbar with "Save & Close" and "Save" buttons. The form fields include "Date" (8/23/2002), "Description" (Breakfast at Tiffany's), "Regarding" (empty), "Reminders" (3,2,1), and a "Memo" section. The bottom window, titled "ToDo Form - Change", has a menu bar with "File", "Edit", "View", "Process", and "Help". Its toolbar includes "Save & Close", "Save", "Delete", and "Cancel" buttons. The form fields include "Date" (8/23/2002), "Priority", "Duration" (0.00), "Code", "Description" (Prepare Living Will), "Staff" (SGRISeth G Rowland), "Regarding" (Rafael S. Alina), "Alina Estate Plan", "2002-023", "Reminders" (3,1), and various checkboxes for "Follow", "Done", "Notify", "Hide", "Trigger", "Private", "Status", "Send To", "From", "Msg", "E-Mail", "Alert", "Alarm", and "AutoMsg". A vertical green bar on the right side of the "ToDo Form" window is labeled "ToDo's - Primary".

EP-Matters – Contacts: Reaching Out to Your Clients

The screenshot displays a 'Contact Form - Change' window with multiple overlapping instances. The primary window shows the following details for Rafael S. Alina:

- Full Name:** Rafael S. Alina
- Last:** Alina
- Code:** EP3|Client-EP
- Staff:** SGR|Seth G Rowland
- Work Phone:** 305-555-1616
- Home Phone:** 305-555-8436
- Gender:** Male
- Citizen?:** Yes

The 'Related' tab is active, showing a list of records:

Event	ToDo	Contact	Matter	Specified	Automatic	Relation	Staff	Code	Client	Matter	
Related Records											
Event Records (2)											
						8/23/2002 5:48PM First Meeting v	Auto	WHA	MEET	Alina, Rafael S.	Alina Est
						9/13/2002 10:00AM Document Sig	Auto	WHA	MEET	Alina, Rafael S.	Alina Est
ToDo Records (1)											
						8/23/2002 Prepare Living Will	Auto	SGR	MISC	Rafael S. Alina	Alina Est
Contact Records (3)											
						Able, Margaret	SpName	SGR	SP3		-
						Baird, Jeremy	Refby	SGR	EP3		Finckler
						Brown, Phillips	Refby	SGR	CLP3		-
Matter Records (2)											
						Alina Estate Plan - 2002-023	Primary Contac	SGR	EP3	Alina, Rafael S.	
						Alina Estate Plan - 2002-023	PersRep	SGR	EP3	Alina, Rafael S.	

Contacts - Related

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EP-Matters – Matters:

Clearinghouse for All Matters

The screenshot shows the 'Matter Form - Change' window with the following details:

- Mat Ref:** Alina Estate Plan
- Code:** EP3|EP-Matters
- Matter No:** 2002-023
- County:** Monmouth County
- Staff:** SGR|Seth G Rowland
- Client:** Wells H. Anderson
- Documents:** Goto 8/23/2002

Date	Time	Desc	Code	FileName
8/23/2002	Fri 6:37PM	Second Living Will		&Rafael S Molina\Rafael Esta
8/23/2002	Fri 6:22PM	New Living Will		&Rafael S Molina\Rafael Esta
8/23/2002	Fri 5:00PM	EP-Matters		&Wayne Allen\Barry Able\doc
8/23/2002	Fri 4:28PM	Test Living Will		&Wayne Allen\Barry Able\Tes
8/23/2002	Fri 3:02PM	EP-Matters		&Allen, Wayne\Barry Able\do
8/23/2002	Fri 2:51PM	Test		&Allen, Wayne\Barry Able\Tes
8/23/2002	Fri 2:25PM	Test		&Margaret Able\Able Test\Tes
8/23/2002	Fri 2:21PM	New Test		&Margaret Able\Able Test\Net
8/23/2002	Fri 1:25PM	Test		&Margaret Able\Able Test\Tes
8/23/2002	Fri 1:21PM	Test	DOC	&Margaret Able\Able Test\Tes
8/23/2002	Fri 1:18PM	Test	DOC	&Margaret Able\Able Test\Tes
8/23/2002	Fri 11:11AM	Sample		c:\temp\sample.doc

Developers of EP-Matters™ WealthCounsel Edition
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EP-Matters – Alerts:

Keeping on top of Your Agenda

Alerts, Reminders, and Watches

File Edit View Search Process

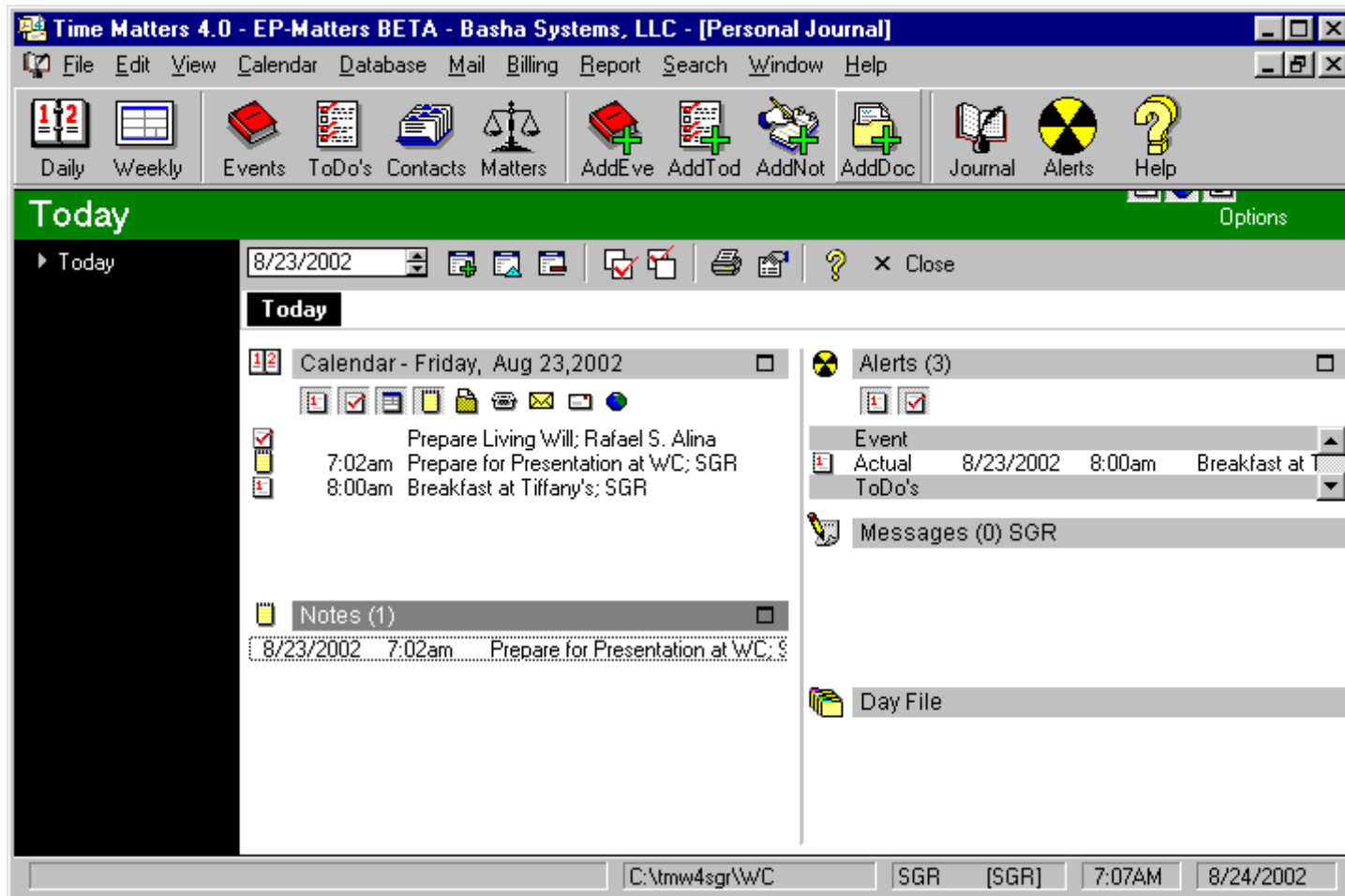
Alerts, Reminders, and Watches Options

Staff SGRISeth G Rowland Date 8/23/2002

Type	Date	Time	Days	Desc
Event				
<input type="checkbox"/> Actual	8/23/2002	8:00am		MEET - Breakfast at Tiffany's - Plan A
ToDo's				
<input checked="" type="checkbox"/> Actual	8/23/2002			MISC - Prepare Living Will - Alina Estate Plan
Custom				-- No Records --
Notes				-- No Records --
Docs				-- No Records --
Phone				-- No Records --
E-Mail				-- No Records --
Mail				-- No Records --
Web				-- No Records --
Billing				-- No Records --

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EP-Matters – Journal: One Place To Call Your Own



EP-Matters – Notes: A Note Here ... A Note There

The screenshot displays the EP-Matters software interface. The main window is titled 'Matter Form - Change' and contains the following information:

- Mat Ref:** Alina Estate Plan
- Code:** EP3IEP-Matters
- Matter No:** 2002-023
- County:** Monmouth County
- Staff:** SGRISeth G Rowland
- Client:** Anderson, Wells H.
- Notes:** A table listing notes for the date 8/24/2002.

Date	Time	Code	Desc	Staff
8/26/2002	Mon 7:41AM		Discussion With Business Appr	
8/26/2002	Mon 7:39AM		Details about Family	
8/26/2002	Mon 7:23AM		Arranged for Papers	

In the background, a 'Note Form - Change' window is visible, showing a note with the following details:

- Date:** 8/26/2002
- Desc:** Discussion With Business Appraiser
- Regarding:** Note Form - Change
- Review:** Details about Family
- Regarding:** Note Form - Change
- Text:** Met with client and sec Clients wants lotsa wor

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EP-Matters – Documents:

Never Lose ... Never Hunt Again

The screenshot shows the 'Matter Form - Change' window with the following details:

- Mat Ref:** Alina Estate Plan
- Code:** EP3|EP-Matters
- Matter No:** 2002-023
- County:** Monmouth County
- Staff:** SGR|Seth G Rowland
- Client:** Anderson, Wells H.
- Documents:** Goto 8/24/2002

Date	Time	Desc	Code	FileName
8/23/2002	Fri 6:37PM	Second Living Will		&Rafael S Molina\Rafael Esta
8/23/2002	Fri 6:22PM	New Living Will		&Rafael S Molina\Rafael Esta
8/23/2002	Fri 5:00PM	EP-Matters		&Wayne Allen\Barry Able\Tes
8/23/2002	Fri 4:28PM	Test Living Will		&Wayne Allen\Barry Able\Tes
8/23/2002	Fri 3:02PM	EP-Matters		&Allen, Wayne\Barry Able\do
8/23/2002	Fri 2:51PM	Test		&Allen, Wayne\Barry Able\Tes
8/23/2002	Fri 2:25PM	Test		&Margaret Able\Able Test\Tes
8/23/2002	Fri 2:21PM	New Test		&Margaret Able\Able Test\Net
8/23/2002	Fri 1:25PM	Test		&Margaret Able\Able Test\Tes
8/23/2002	Fri 1:21PM	Test	DOC	&Margaret Able\Able Test\Tes
8/23/2002	Fri 1:18PM	Test	DOC	&Margaret Able\Able Test\Tes
8/23/2002	Fri 11:11AM	Sample		c:\temp\sample.doc

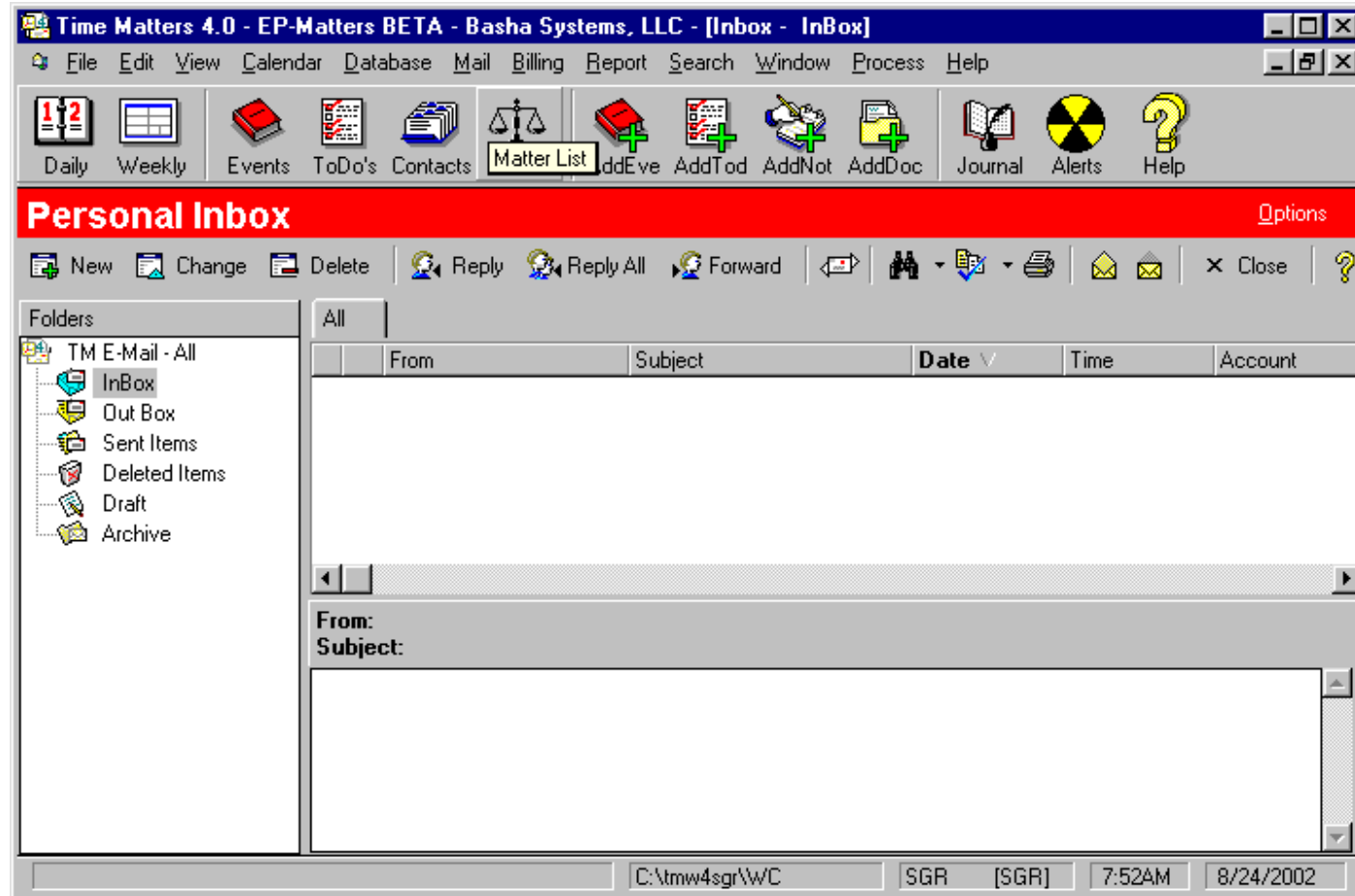
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EP-Matters – E-mail:

E-mail That Files Itself



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EP-Matters – Mail/Records Management:

Now You Can Find Your Papers

The screenshot displays the 'Time Matters 4.0 - EP-Matters BETA - Basha Systems, LLC - [Mail]' application. The main window has a menu bar (File, Edit, View, Calendar, Database, Mail, Billing, Report, Search, Window, Process, Help) and a toolbar with icons for Daily, Weekly, Events, ToDo's, Contacts, Matters, AddEve, AddTod, AddNot, AddDoc, Journal, Alerts, and Help. A 'Mail' sidebar is visible on the left, showing a filter for 'All Records' and a table with columns 'Date', 'Time', and 'Description'. The 'Mail Form - Add' dialog box is open, containing the following fields:

1

Date: 8/26/2002 (Mon) Time: 7:55am Code: GEN|General
Desc: Staff: SGR|Seth G Rowland
Regarding: Wells H. Anderson Alina Estate Plan 2002-023
Reminders: Follow Done Notify Hide Trigger Private Status:

2

To: Diane P Abraham
Firm: Davis and Woodbridge
Address: 45 Biscayne Boulevard
Suite 1200
City: Miami FL 33131
Tel/Fax: 305-555-1702 305-555-7869

3

Carrier:
Service:
Doc ID:
Received: Sent:
Class: Amt:
Weight: Size:

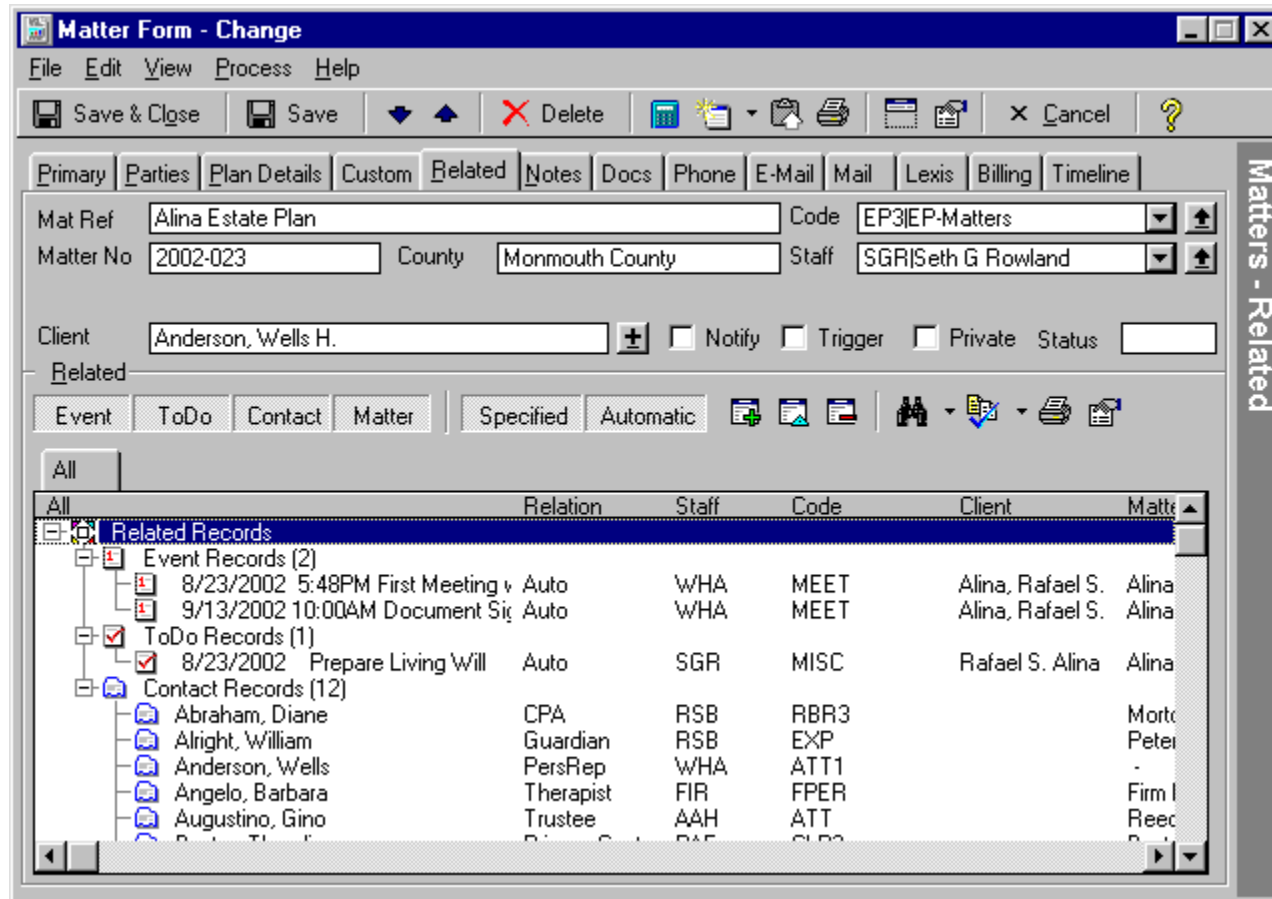
4

User1: User3:
User2: User4:

5

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EP-Matters – Related Tab: From Here to There And Back



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EP-Matters – QuickTabs:

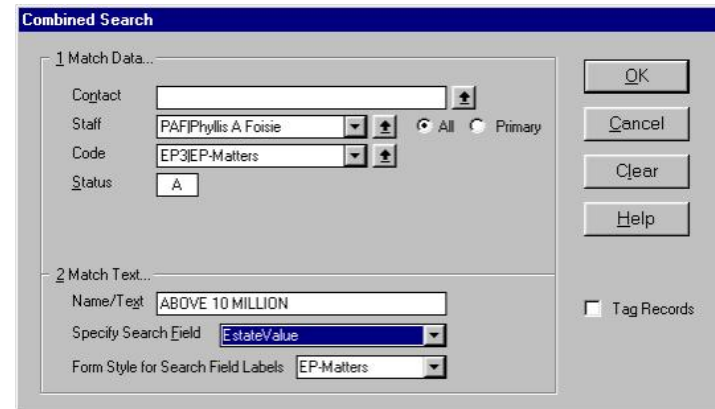
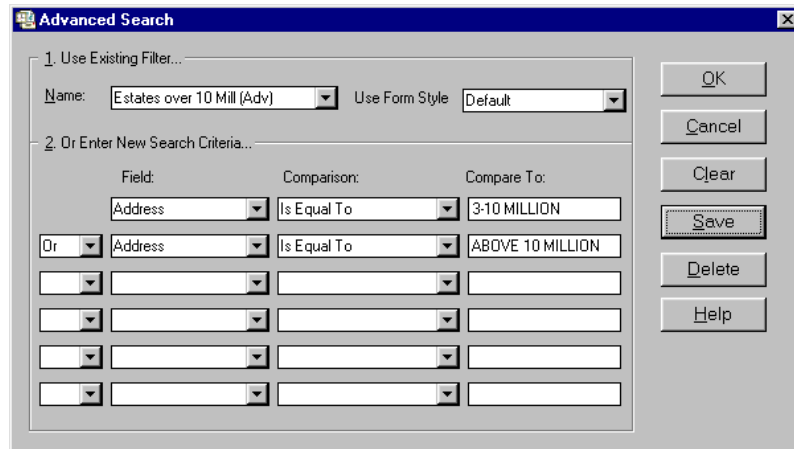
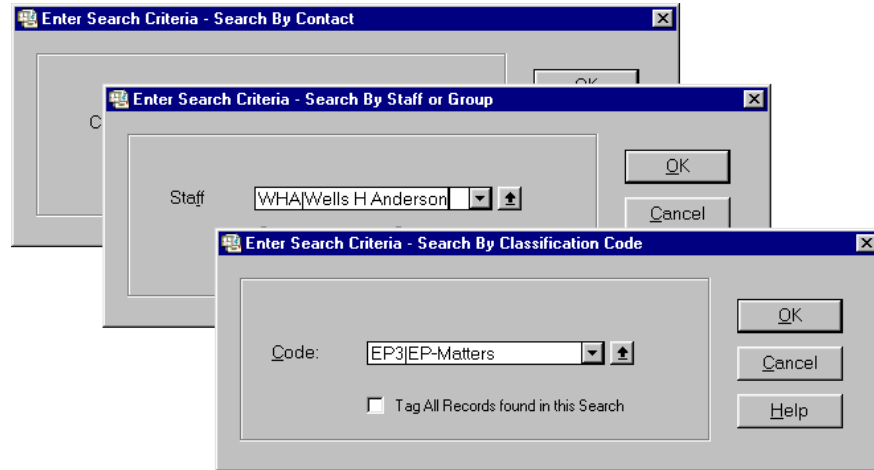
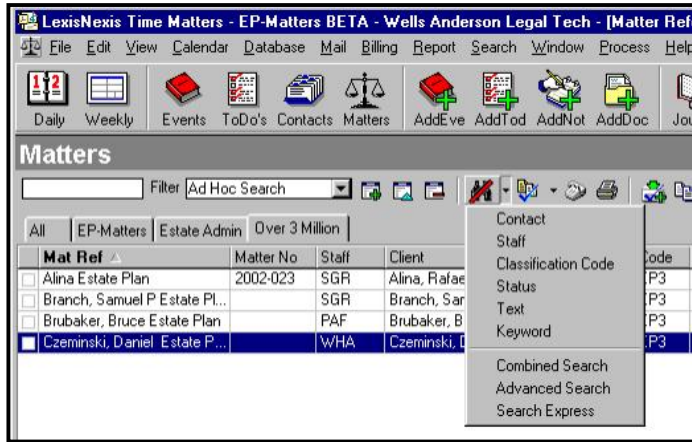
Searches just a click away

The screenshot displays the LexisNexis Time Matters software interface. The window title is "LexisNexis Time Matters - EP-Matters BETA - Wells Anderson Legal Tech - [Matter Reference Sub-...". The menu bar includes File, Edit, View, Calendar, Database, Mail, Billing, Report, Search, Window, Process, and Help. The toolbar contains icons for Daily, Weekly, Events, ToDo's, Contacts, Matters, AddEve, AddTod, AddNot, AddDoc, Journal, Alerts, and Help. The main window is titled "Matters" and features a search filter set to "Ad Hoc Search". Below the filter, there are tabs for "All", "EP-Matters", "Estate Admin", and "Over 3 Million". A table lists several matters, with the last one, "Czeminski, Daniel Estate P...", selected. The status bar at the bottom shows the file path "c:\tmw4sgr\wc", user "SGR", and date "8/29/2002".

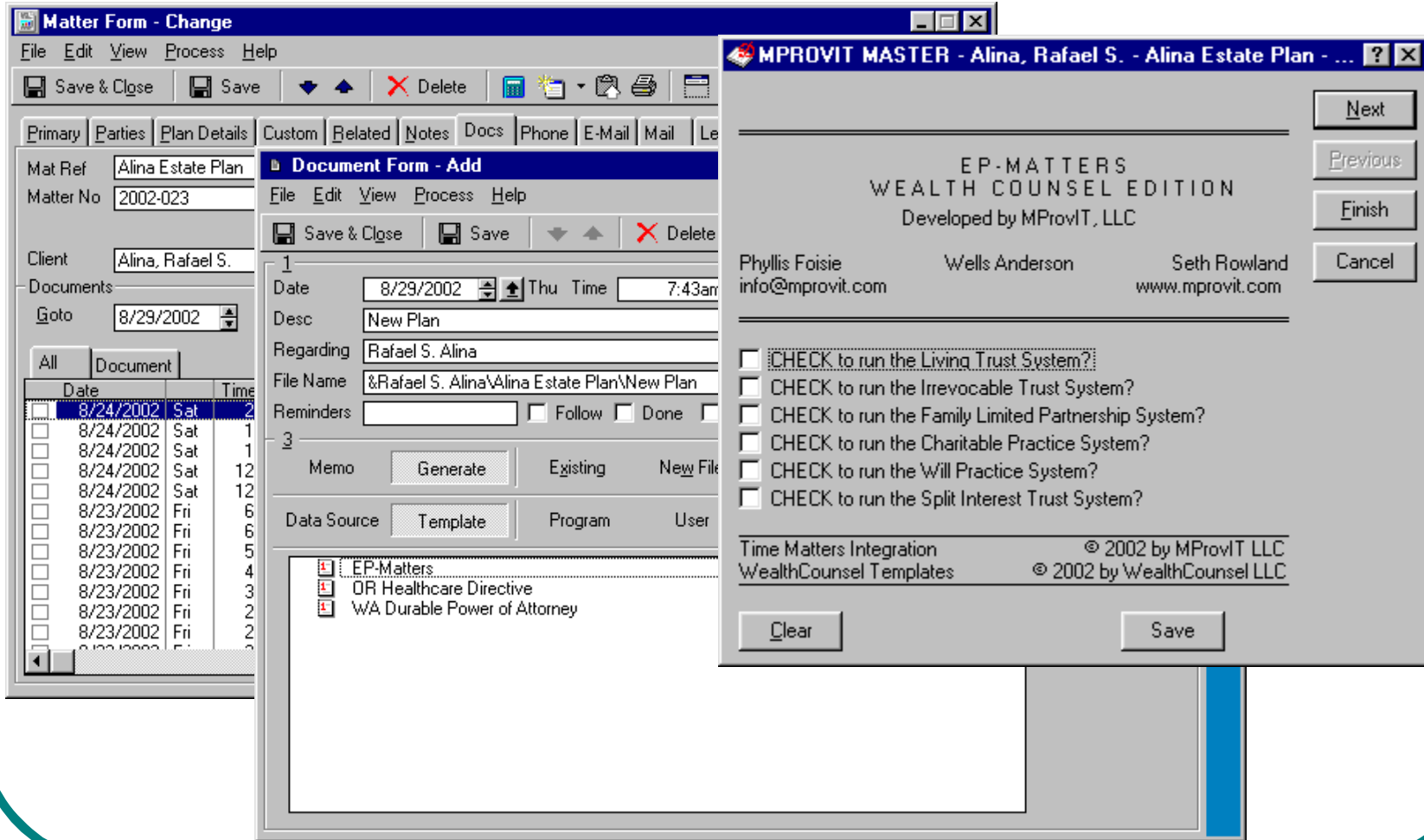
Mat Ref	Matter No	Staff	Client	Work/Hm	Code	
<input type="checkbox"/>	Alina Estate Plan	2002-023	SGR	Alina, Rafael S.	305-555-1616	EP3
<input type="checkbox"/>	Branch, Samuel P Estate Pl...		SGR	Branch, Samuel P	954-555-0231	EP3
<input type="checkbox"/>	Brubaker, Bruce Estate Plan		PAF	Brubaker, Bruce	516-555-1492	EP3
<input checked="" type="checkbox"/>	Czeminski, Daniel Estate P...		WHA	Czeminski, Daniel	305-555-0638	EP3

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EP-Matters – Searches and Filters: Slice and Dice... Got Your Ginzu



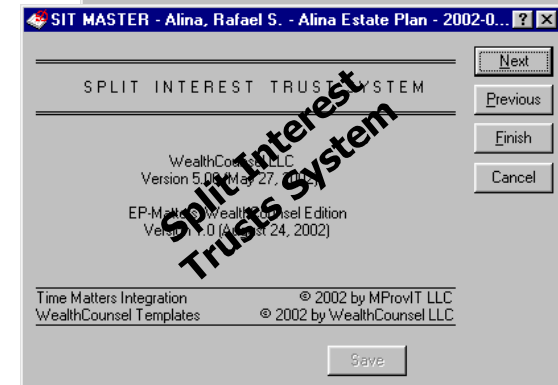
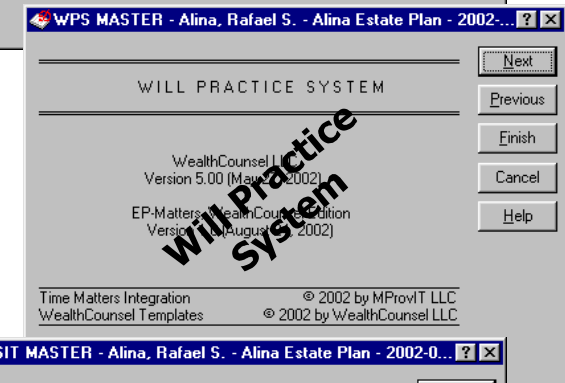
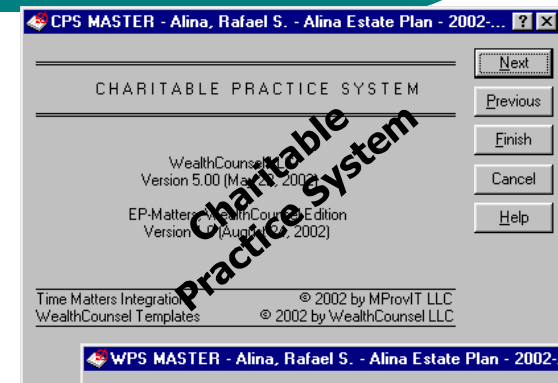
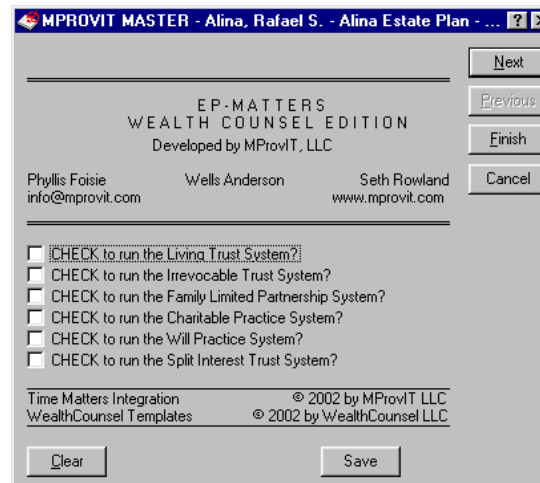
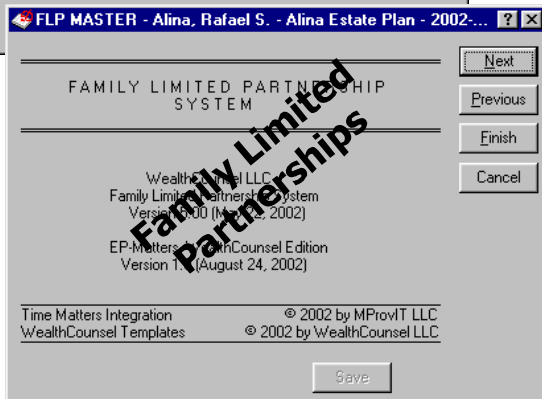
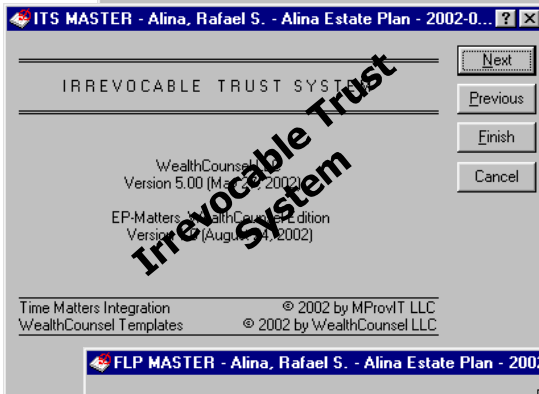
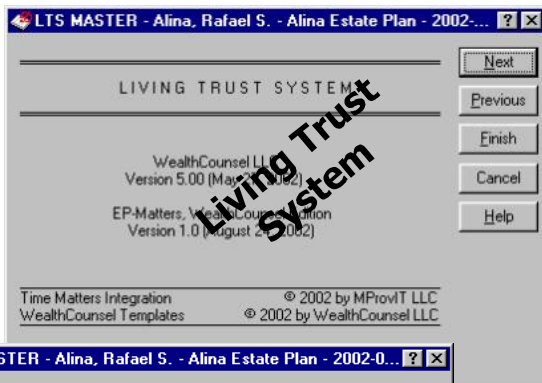
EP-Matters & WealthCounsel: Launch WealthCounsel from TM



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EP-Matters & WealthCounsel: Access the Right Library



EP-Matters & WealthCounsel: Preferences, Interviews & Instruction

LTS PREFERENCES - Alina, Rafael S. - Alina Estate Plan - ... ? X

Preferences

CHECK to print out WealthCounsel instruction sheets?
 CHECK to set Preferences for Living Trust System?

Interviews

CHECK to run an LTS Master Interview?

Document Selection

CHECK to select one or several LTS Documents to assemble?

None of the Above

Next Previous Finish Cancel Help Clear Save

LTS CLIENT DATA - Alina, Rafael S. - Alina Estate Plan - 2... ? X

Interviews - Input Client Data

CHECK the box below to run the appropriate master client interview for the type of Living Trust you wish to create:

Individual Revocable Trust Agreement?
 Joint Living Revocable Trust Agreement?
 Create a Spouse Answer File?
 Ancillary Document Information?

None of the Above

Clear Save

LTS INFORMATION - Alina, Rafael S. - Alina Estate Plan - ... ? X

Information about the Living Trust System

CHECK for Editing and Formatting Instructions?
 CHECK for instructions on creating a Married Separate Living Trust Plan?
 CHECK for instructions on creating a Joint Living Trust Plan?

None of the Above

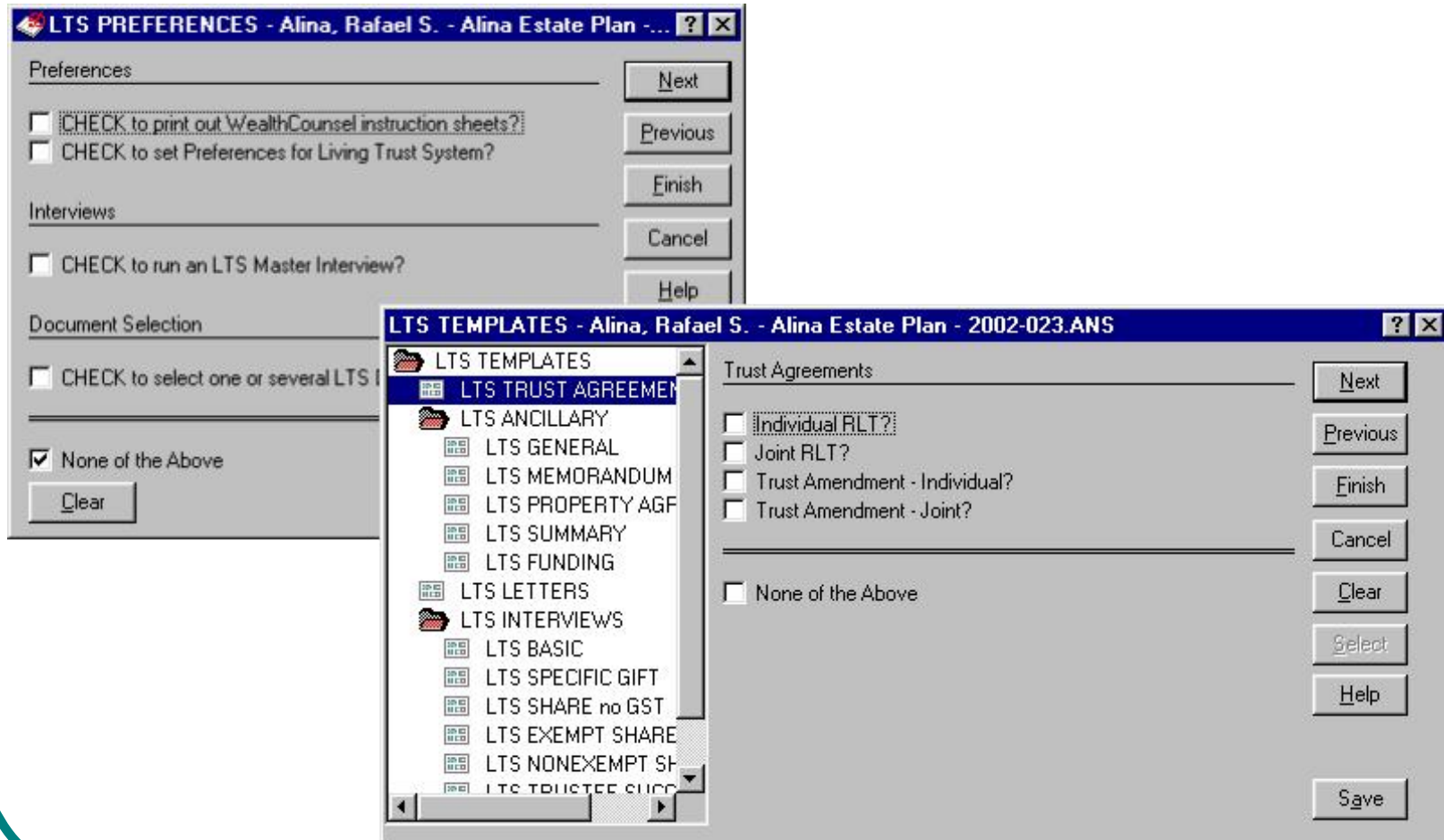
Next Previous Finish Cancel Help Clear Save

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EP-Matters & WealthCounsel:

Finding the Right Template



The EP-Matters Package

- Cost of the Package:
 - Enrollment Fee: \$1,295
 - Subscription Fee: \$119/month
(12 months minimum)
- Includes:
 - Software package and installation assistance
 - Continuing membership benefits
- Target Release Date: St. Louis (10/02)

Software and Services

- Feature Package customizing Time Matters for estate planning
- Integration of Time Matters with WealthCounsel templates
- Live installation assistance over the Internet
- Bundled technical support in converting existing data to EP-Matters
- Live training sessions via the Web and teleconference
- Discounts on Time Matters and HotDocs software
- Discounts on custom training and consulting

Benefits of Annual Membership

- On-going, live Web training seminars and demonstrations
- Continuing live technical support
- Updates to accommodate changes to WealthCounsel templates
- Stream of new features requested by members of EP-Matters
- Discussion forum via E-mail and Web Board
- Future integration with other WealthCounsel strategic partners

What it means for you!!!

- Improve your practice with technology
- Earn your fixed fee in less time
- Gain repeat work from your clients
- Attract new paying clients
- Go to one place for everything
- Expand the pie

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EP-Matters from MProviT:

Improving Your Practice with Technology

MProviT LLC

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