

# Popular Threads on Solosez

## Wills and Trusts Software Package

Can someone recommend a wills and trusts software package? I have heard one in particular is invaluable. It allows for simple insertion of basic information and allows you to pick your state, etc. Thanks so much in advance.

---

use Fore! Trusts. It is a fabulous program. The designer /owner is Dennis Fox, [dennis@4trustsoftware.com](mailto:dennis@4trustsoftware.com), and he is always very helpful. [www.4trustsoftware.com](http://www.4trustsoftware.com)

Tracy L. Griffin, Florida

---

I use my own system:

1. Pathagoras. It's a complete document assembly system. I use it for ALL of my document production needs, including estate planning. You can easily create your own plain text forms, incorporate variables, multiple choice lists, etc. The price is very reasonable, and the owner / programmer is always accessible for tech support and feature requests. (Just Google "pathagoras" and you'll find the website. Solosez rejects me as spam if I include links in my posts.)

2. A form library from a state-specific CLE. We have a great book ("Estate Planning in Virginia") that provides awesome education on the topic along with forms for virtually any type of estate document.

The beauty of this system is its flexibility. Pathagoras works with any form you buy, borrow, or build yourself. And I know that the CLE forms are a great start for me to customize and have the perfect documents. Plus it's much cheaper than Fore! Trusts.

Andrew Flusche, Virginia

---

Which one did you hear is "Invaluable"?

Sandra Perez Ard, Texas

---

I also use Four Trusts and highly recommend the program. I had a question, called the customer service number and Dennis, (the creator who is an experienced estate planning attorney), personally answered the phone.

Best Regards,

Jay Stoegbauer

---

Which is the best software depends on what type of estate planning you are doing.

Wealth Counsel has, what I think is probably the top system. But it is expensive and really focused on high

net worth clients with more complicated planning. If you are not dealing with clients with large complicated estates it may be more than you need. Remember, the Fed. Estate tax exemption is \$3.5 million this year, do your clients have a tax issue?

Along the same lines as Wealth Counsel there is the National Network of Estate Planning Attorneys with their document creation software and another company with a product called Wealth Transfer Planning. These too are for larger estates with more complex tax planning.

For the more modest planning needs there is Cowles Trust Plus. It covers more basic planning with Trusts and Wills, and does contain estate tax planning as well, just not the higher end planning that the above listed titles have.

I think Fore! Trust is on a par with Cowles, and is less expensive. Cowles has a proprietary assembly engine which saves docs as .rtf and then they need to be exported and saved as .doc. Fore! Trust operates on the Hot Docs assembly platform and can save directly as a .doc file.

If you have your own forms and don't need anything terribly complicated you can do as someone suggested and use Hot Docs or Pathagoras to automate the assembly.

There is other software out there as well, like the DL Drafting Libraries, etc.

The first step in deciding is determining what type of planning you will be doing and what kind of documents you will need to produce. This depends on your client base.

Another thing to look for is the pricing structure. Some of the software has an annual fee or subscription, like Cowles, Wealth Transfer Planning. Some has a high initial membership fee and then monthly fees as well, like Wealth Counsel and National Network. Some, like Fore! Trust has an initial purchase and a subsequent annual update subscription.

I have been using Cowles for several years, together with my own forms for many things. I haven't been able to integrate them as much as I would like (mostly lack of time devoted to it). But sometimes the interface both for producing docs and for customizing the forms is clunky. The annual renewals are expensive and the software stops without it. So this year I'm seriously looking at Fore!Trust. It seems to have the same documents, is more reasonably priced, has a much better annual subscription fee and being built on Hot Docs, might integrate better in my practice.

Michael D. Caccavo, Vermont

---

How much planning HAVE you done?

These packages are great tools for the experienced planner and a real trap-for-the-unwary for the inexperienced one. Your statement seems to imply that you want a system which will allow you to plug in information and do the thinking for you. I hope I'm incorrect -- you need to actually UNDERSTAND the language inside these documents so that you can properly adapt them to meet your clients needs.

Sasha Golden, Massachusetts

---

On that note, does anyone have reading recommendations for those of us looking to learn more about estate planning? I certainly understand the basics, but I'd like something that reinforces the basics and brings my knowledge up to an intermediate level. Or thereabouts.

And, of course, I don't want to spend a whole ton of money (ideally, under \$100).

Thanks all,

Beverly West, Oregon

---

Harold Weinstock, Planning an Estate.. usually \$99.00 on Amazon.

Pat Crotty, Illinois

---

In my opinion, a practicing lawyer is a lot like an artisan or a craftsperson, who is filling a need in a specialized craft for a specific person, the client.

Say someone walks into the shop and wants a copper vessel of a certain size, for a particular purpose. The copper smith will make it, after learning the specifics of the customer's need.

Therefore, the best way to learn estate planning after the law school basics is by on-the-job practice. Now, unlike copper pots, the hole or leak in a will or trust is not noticed right away, because the object is not tested for many many years.

What is the apprentice to do?

Probate is a good way to start. There are papers to file, a will to administer, or if no will, then the intestacy laws to follow. The novice learns a great deal, as I did in my first probate three months out of law school. In addition, if the novice makes mistakes, the court will refuse to accept the papers, or will refuse to proceed until things are done right. On-the-job training.

The will <drafted by another attorney, lacked a residuary clause, and the estate had a personal injury settlement (my case) that would pass according to a missing residuary clause. I will NEVER forget to make sure every will and trust I draft has a residuary clause.

Estate planning has a lot to do with taxes. One thing that a novice can do is get experience in tax preparation, tax planning, and tax law changes. When there is a mistake, lo-and-behold, a letter appears from the IRS within a year or two! Good on-the-job training.

Well, that is just a start! Good luck!

Lynn Sherrell, California

---

I'm still looking at ProDoc's packages and trying to decide whether to add Lipman's Wills & Trusts Manual to the list. Can anyone comment or compare it to Fore Trust or the Small Estate Wills pkg offered by ProDocs?

Toni G. Warder, Texas