# Wealth Transfer Planning

## Practice with Confidence!

Wealth Transfer Planning® (powered by HotDocs®) is the most powerful and drafting system for estate planning professionals. All WTP Practice Systems include extensive content help, available every step of the way. Document intake dialogs contain help and legal commentary for each question. Our exclusive substantive audio-visual tutorials, recorded by Jonathan G. Blattmachr, elevate the help system to the next level, providing more guidance on advanced and complex topics such as tax planning, tax apportionment, credit shelter trusts, and more. In addition, document interviews can be run in our exclusive "tutorial mode," which provides an extra level of help. Functional help is also available via a series a audio-visual tutorials, accessible from within the system. The system is available in three versions. See page 2 for complete list of what's included in each version.

All WTP versions are subscription based, and renewable annually. Included with all licenses is HotDocs Player software, at no additional cost. All WTP versions are updated regularly through a web updating service. **Twelve months of content updating service is included.**

## Wealth Transfer Planning — A Version for Everyone

**WTP Essentials** — Essentials is our most cost effective version, but with the high technical quality you would expect from the WTP brand. Wills, Revocable Trusts, Irrevocable Trusts, Powers of Attorney, Private Annuity Agreement, and client administrative materials are included. The Essentials version covers the most common planning scenarios for the clients who prefer a simpler plan or have a non-taxable estate. Forms and profiles are not customizable. You can add user licenses and seamlessly upgrade to Standard or Professional at any time during the subscription cycle (pro rated fees apply).

**WTP Standard** — The Standard version contains a full complement of comprehensive Wills, Trusts, Powers of Attorney, business planning documents, strategic planning memoranda. More advanced trusts include GRATs, QPRTs, Lifetime QTIP trusts, Charitable trusts, and Minors' trusts. This version is designed for lawyers whose clients have more sophisticated planning needs or who desire to minimize estate and generation skipping transfer taxes. The Standard version is fully customizable. You can add licenses and seamlessly upgrade to Professional at any time during the subscription cycle (pro rated fees apply).

**WTP Professional** — The most comprehensive system, WTP Professional contains all the forms, commentary, tutorials and analyses in WTP Standard, but with additional services. The Professional version includes unlimited technical and content support (from the WTP authors) and free access to all the Leimberg Information Services (LISI)™ research tools (via a web link).

Wealth Transfer Planning utilizes the proprietary SmartContent Technology™ user-interface (patent pending), organizing and managing your clients and documents in a easy-to-navigate "tree" structure. The system can be installed on a single computer or network, and is multi-user and network compliant. Customization tools permit users to modify the form language, styles, and default answer sets. A full security module controls user permissions.

# Wealth Transfer Planning
## Version Comparison Chart
### What's Included

| Forms and Planning Options | Essentials | Standard | Pro |
|---|---|---|---|
| Wills and Revocable Trusts (single and joint grantor) for Non-taxable Estates (limited options — no tax planning) | X | X | X |
| Irrevocable Trusts (with/without insurance) — basic planning | X | X | X |
| Powers of Attorney (durable, health care, living wills and HIPAA) | X | X | X |
| Private Annuity Agreement | X | X | X |
| Client Aid Documents (Fee agreements, engagement letters, questionnaire) | X | X | X |
| Wills and Revocable Trusts (single and joint grantor) for Taxable Estates (extensive advanced tax & planning options) | | X | X |
| Irrevocable Trusts (with/without insurance) — with advanced Crummey Powers and GST Planning | | X | X |
| Grantor Retained Annuity Trust (GRAT) (including "Walton" GRAT) | | X | X |
| Qualified Personal Residence Trust (QPRT) | | X | X |
| Lifetime QTIP Trust (including Supercharged Credit Shelter Trust$^{SM}$) | | X | X |
| Charitable Planning (CRTs, CLTs, and wholly charitable trusts) | | X | X |
| Split Purchase Trust$^{SM}$ (service marked strategy) | | | |
| Minor's 2503c Trust | | X | X |
| Business Agreements (Limited Partnership Agreement, LLC, Buy-Sell, etc.) | | X | X |
| Strategic Planning Analyses and Memoranda (complete set , each evaluating one of 11 strategies) | | X | X |
| Marital Agreements (separate property agreement, partition agreement, spousal agreement & consent) | | X | X |
| **Technical & Support** | | | |
| Basic web-based training—Functionality and Formatting Classes | X | X | X |
| Technical & Content Support (live) First 30 days (charge applies after 30 days, except for Professional Version) | X | X | X |
| Legal Discussion Forum & Knowledgebase Access (login required) | X | X | X |
| 90-minute one-on-one personal coaching session (using web link) | | | |
| Customization Tools (customize language in templates; profiles) | | X | X |
| Advanced web-based training—Customization Classes | | X | X |
| Technical & Content Support (live) Full Year | | | X |
| Free access to Leimberg Information Services (LISI) research tools via web link | | | X |
| **Coming soon!** Integration with WTP TimeMatters® Feature Package* | X | X | X |
| *TimeMatters® and WTP Feature Package to be marketed by Basha Systems, LLC | | | |