

*“Sometimes work volumes are so high that when a client calls in on an estate matter, I can’t even remember which of our four legal assistants was helping me on that particular file. EstateWorks has been a godsend because I just go out to our web site, find out who my teammate is on that file, and I have all of the documents, the notes and the deadlines in front of me. It’s really been a lifesaver.”*

Estate planning and administration invariably involves documents — lots of documents. Traditionally they have been created and stored primarily on paper, but paper-based documents present a number of challenges to efficient estate planning and administration. The partners at Lewis, Rice & Fingersh, L.C. found a solution to those problems: EstateWorks.

Founded in 1909, Lewis, Rice & Fingersh is a firm of more than 170 attorneys who work from eight different offices. In addition to its estate planning and probate practice, the firm also offers services in the areas of antitrust; bankruptcy and creditors’ rights; corporate law; environmental, chemical and toxic tort; government affairs and administrative law; healthcare; intellectual property; labor and employment; litigation; media and communications; municipal law, zoning and finance; pension and employee benefits; real estate; tax; and technology, computers and electronic commerce.

### The Paper Chase

In a practice spread across eight offices there is always going to be lots of travel and working from remote locations. For paper-based systems this can present several challenges. For example:

- It can take a long time to access paper documents, particularly if the documents are stored elsewhere.

- Physical documents are subject to being accidentally misfiled or lost.
- Work that involves passing paper documents from one person to another can be cumbersome and inefficient.
- It is not easy to cross reference paper files and to locate data by anything but the file name.

These were just a few of the challenges that led the members of the estate planning and probate practice of Lewis, Rice & Fingersh to look for a better way to manage their business.

### Rising to the Challenges

One Lewis, Rice & Fingersh partner, Lisa McLaughlin, faced a particular case management challenge that turned out to be an opportunity to make her practice much more efficient. An attorney with a thriving estate practice was getting ready to retire and Ms. McLaughlin was taking over his work. What was the challenge? The retiring attorney was in one of the satellite offices, but Lisa worked out of the main office. She had to move, but none of the legal assistants were moving with her.

After the move, without the files for her clients at hand, Lisa felt as though she was practicing law blind. When a client called she needed to call the legal assistant who had worked on the file to answer the question. Finding the right

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Assignments Triggered by  
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Tax and Probate  
Accounting Systems*

legal assistant and tracking her down became a costly and time consuming task.

The solution was EstateWorks. After one of the partners saw an EstateWorks demonstration, the firm decided to investigate further.

EstateWorks is a Web-based portal that provides a powerful set of tools for case and workflow management. EstateWorks empowers legal and financial professionals to control and manage their trust and estate practices by replacing fragmented systems and processes with simplifying technology. It can capture, track and manage the flow of all documents and notes concerning an estate file, thereby ensuring that estates are well documented. Improved efficiencies allow estate administrators to handle a significantly greater workload. EstateWorks allows professionals to concentrate on what they do best — estate planning and administration — without having to worry about the underlying file and task support issues.

### Evaluating the Solution

To evaluate EstateWorks, Lewis, Rice & Fingersh formed a committee of three partners, two senior associates and three senior assistants. After looking at a demonstration and having their questions answered by the EstateWorks

team, the committee's evaluation found that EstateWorks would solve the document and workflow management issues, but there was still one concern: security. Would the firm's documents be safe?

After discussing data security with EstateWorks, the committee was satisfied that the security and privacy of their documents would be fully protected. The EstateWorks system is located in a Tier One IBM data center guarded 24 x 7, with the EstateWorks servers in a video monitored and locked cage. A sophisticated firewall protects the system from hacker attacks, as well as from unintentional unauthorized access from the Internet. Any data passing over the Internet to or from EstateWorks is encrypted using the highest level of encryption allowable by US law for nonmilitary use.

In addition, EstateWorks stores each customer's data in a separate database so each EstateWorks client can only access their own data.

### Reaping the Rewards

Ms. McLaughlin made EstateWorks an integral part of her practice. The benefits have been substantial.

Even though she works at a satellite office and a file and the assistant working on it may be in the main office,

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if a client calls up or walks in without an appointment, Ms. McLaughlin can immediately access the file and all relevant documents using just a standard Web browser. It’s as if every document, for every client is instantly at her fingertips, despite the fact that the physical copies may be miles away. And, as Ms. McLaughlin points out, “even if the files were just across the hall, she still wouldn’t be able to retrieve them with anywhere near the speed that EstateWorks offers.”

In addition, the EstateWorks checklists and deadline management facilities help the firm ensure that all deadlines are met. The system is integrated with automated tax form generation systems, asset evaluation systems and external filing systems, as well as the firm’s document management system. Now, any attorney assigned to a case can see at a glance the status of all work on that case — who is assigned to do what and review all upcoming deadlines. All estate contacts are kept in a single data base so there is no longer any need to re-enter data to fill out forms or initiate correspondence. All case data is available, all of the time, from wherever you are.

The automated estate planning and settlement capabilities in EstateWorks enables professionals to have a single and complete source of knowledge about their cases, maintain control over the activities that need to occur in a

given case, and remain compliant to all deadlines associated with the case. This combination of knowledge, control, and compliance differentiates EstateWorks from all other automation tools in the market today.

In addition, EstateWorks is web based so there is no equipment to purchase or software to buy. It is easy to use from any standard browser and users can be up and running quickly. The result is a single source for complete management of the estate planning and settlement business.

Ms. McLaughlin says that EstateWorks is a tremendous help in managing the firm’s trust and estate business. With EstateWorks, the distributed nature of the firm’s work is no longer a problem. The EstateWorks, simple-to-use, web-based system is always available to support the needs of the firm’s professionals.