

“Our clients rely on us to provide them with the best possible advice and service regarding estate planning and settlement. In order to be effective and efficient in how we input and leverage key data and information, we rely on EstateWorks.”

“And because meeting deadlines is crucial in our business, we depend on EstateWorks to give us the ‘piece of mind’ that deadlines will be tracked and never missed.”

William M. Pearson
Named Partner at Grant,
Fridkin, Pearson, Athan &
Crown

Grant, Fridkin, Pearson, Athan & Crown (GFPAC) combines practice area specialization and team work to best serve the interests of its clients. Each practice area including business, real estate, transactional and related tax services; commercial and probate & trust litigation; and trust & estate planning and administration is led by an attorney with Florida Bar Board Certification of specialty in that practice area.

The firm is dedicated to assisting its clients in solving legal issues with a focus on professional excellence that ensures its clients receive objective and competent legal advice.

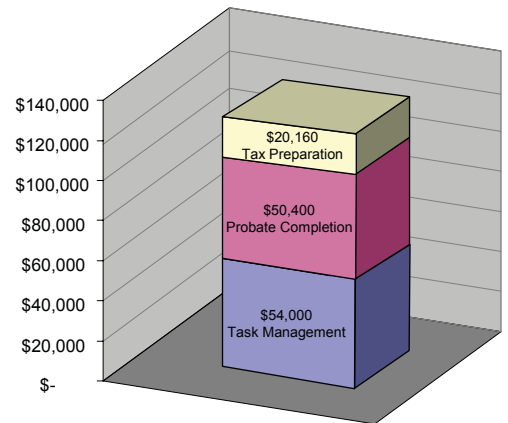
With a growing Trusts & Estates Practice, managing tasks, meeting deadlines, completing probate forms and preparing tax returns was rapidly becoming a challenge. To meet the challenge, GFPAC turned to EstateWorks. With EstateWorks workflow and case management software, GFPAC automated their predominantly paper-based estate settlement process enabling them to more efficiently and reliably organize tasks, manage deadlines, complete probate forms and prepare tax returns.

Measuring Success

EstateWorks Benefit Summary	
Return on Investment (ROI)	678%
Payback Period (in Months)	2
Total Net Benefit	\$108,555

Using EstateWorks, GFPAC has realized the following quantifiable benefits: reduced the time required to manage tasks and deadlines from 3 hours per week to less than 1 hour; eliminated data entry mistakes and saved 2 hours per case when preparing probate forms using EstateWorks integrated Florida forms; and prepared tax returns in 2 hours less time by exporting data from EstateWorks and importing it directly into their tax preparation software.

Benefit Breakdown



Long Term Benefits

	2005	2006	2007	Total
Annual Fees	\$5,335	\$5,335	\$5,335	\$16,005
Productivity Benefit	\$28,620	\$43,200	\$52,740	\$124,560
Net Benefit	\$23,285	\$37,865	\$47,405	\$108,555