



PRIVATE CLIENT SUITE

Clarilis Private Client



Accelerate Wills, Trusts, and LPA drafting to transform your firm's margins

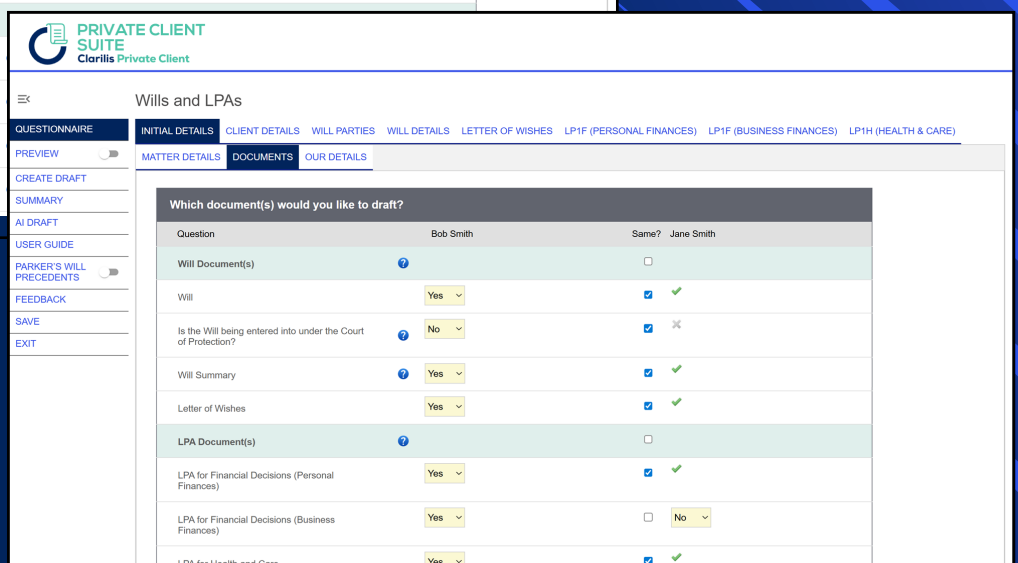
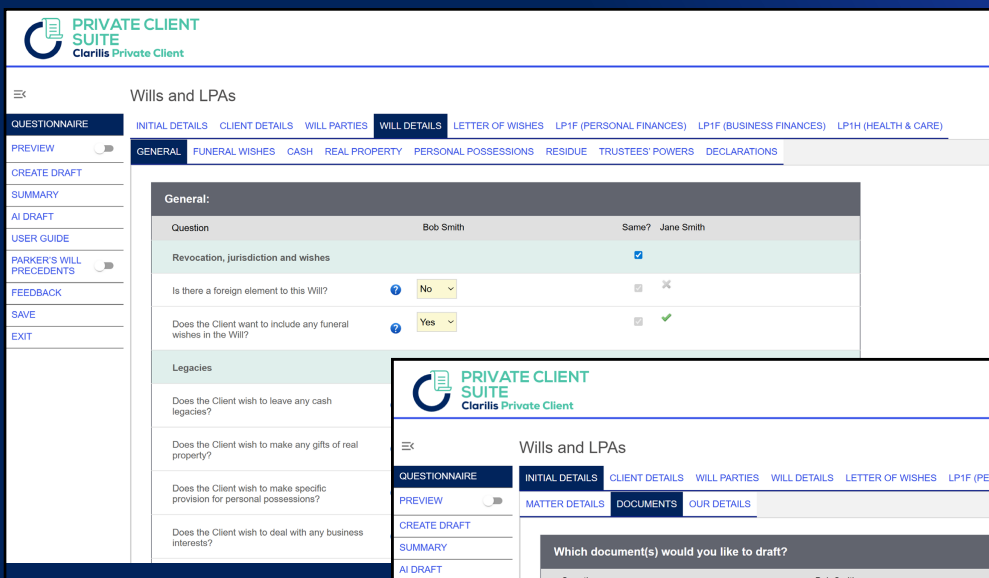
Clarilis automates the drafting of wills and estate planning documents, enabling your team to work faster, increase capacity, and improve profitability - all without compromising on quality.

Free up your team to focus on higher-value client work while delivering a faster, more efficient service.

The automation is based on Parker's Will Precedents (11th Edition) and content from the Office of the Public Guardian. It includes fully cross-referenced and in-platform access to the Parker's textbook.

Why automate?

- Draft private client documentation in minutes – saving hours per matter
- Increase capacity in busy teams
- Designed for both single and joint instructions, enabling seamless drafting of partially mirrored wills
- House styled for your firm
- Flexible to meet the complexity of your client's requirements
- Delegate to junior team members with confidence
- Standardise processes to reduce admin and errors
- Based on the content from Parker's Will Precedents and the Office of the Public Guardian



Includes AI Draft



The automated documents include the following:

Will Documents

- Choice of law, funeral wishes, appointments of guardians
- Legacies in respect of cash, personal possessions, digital assets, real property, the inheritance tax nil rate band and business interests
- Rights of occupation of real property, life interest trusts and discretionary trusts
- Charitable giving, gifts to minors and provisions for disabled and/or vulnerable beneficiaries
- Appointing alternative trustees for particular trusts
- Incorporating the STEP provisions and/or bespoke powers for trustees

Additional Will Documents

- Letter of Wishes
- Discretionary Life Interests Trust Letter
- Life Interest Trust Letter
- Memorandum of Wishes for Digital Assets
- Notice of Severance
- Land Registry Form SEV
- Will Summary (coming soon)

Lasting Powers of Attorney

- Lasting Power of Attorney (Health and Welfare)
- Lasting Power of Attorney (Property and Financial Affairs for Personal Finances)
- Lasting Power of Attorney (Property and Financial Affairs for Business Finances)
- LPA120
- LP3
- Continuation Sheets 1 – 4
- LPA Summary

Other Documents

- Signing Letter
- Cover Letter

Integrations

- Royal Mail PAF (address and postcode lookup)
- Charity Commission Register of Charities
- Companies House
- Includes access to the Parker's textbook content and guidance



Exceptional content

combined with our powerful

automation platform

