Clarilis Private Client

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Automated private client documents - draft wills and trusts in minutes

Clarilis frequently automates suites of documents for private client practices.

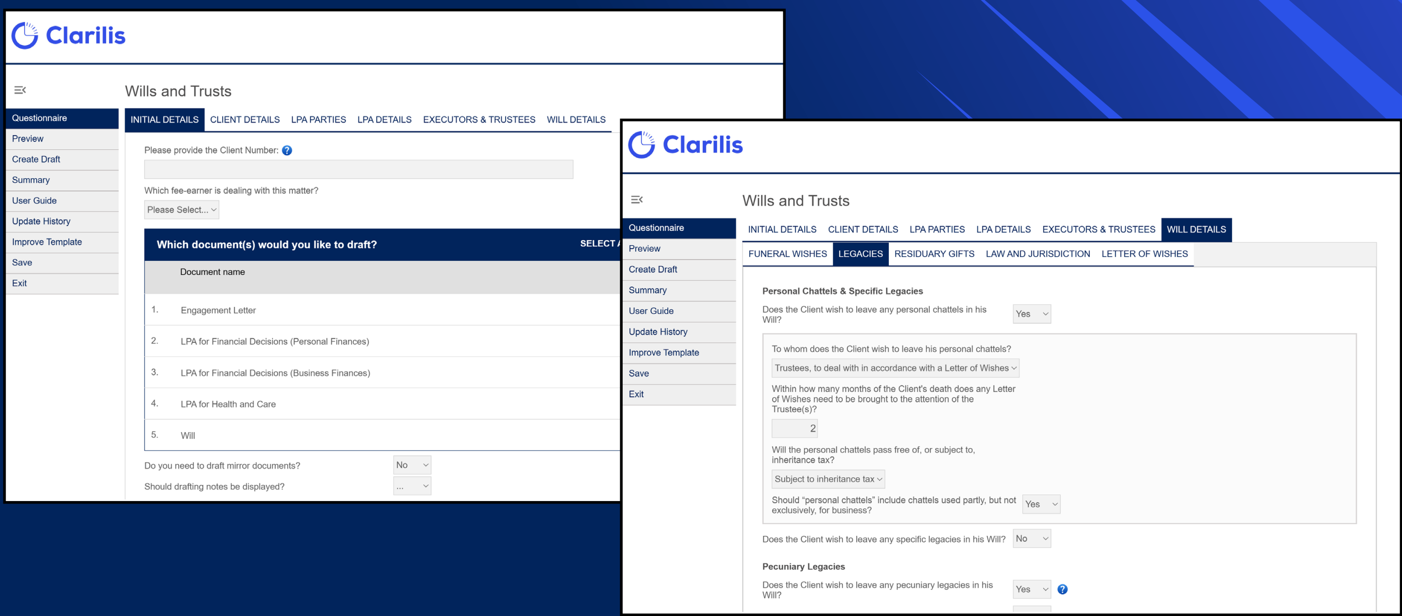
When it comes to private client work, margins can be tight, the work complex and matters are often subject to fixed fees. Due to the nature of the work significant time is spent consulting with the client in meetings, leaving little budgeted time to draft the resulting documents.

Clarilis provides deep automation of documents frequently drafted by private client teams, such as wills and mirror wills, trust documentation, and Powers of Attorney.

Why automate?

- Drastically reduce drafting time
- Improve margin by working more efficiently
- Price more competitively
- Enable your lawyers to focus on higher-value activities
- Enable delegation in a risk-mitigated environment
- Customised to suit the needs of your firm

Includes AI Draft



Clarilis has automated a range of private client documents:

- Wills (single and mirror)
- Will summaries
- Trusts (of various types)
- Trust summaries
- Lasting Powers of Attorney (inc. LP3)
- LPA summaries
- Engagement Letters
- Letters to Client
- Letters of Wishes

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