



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.

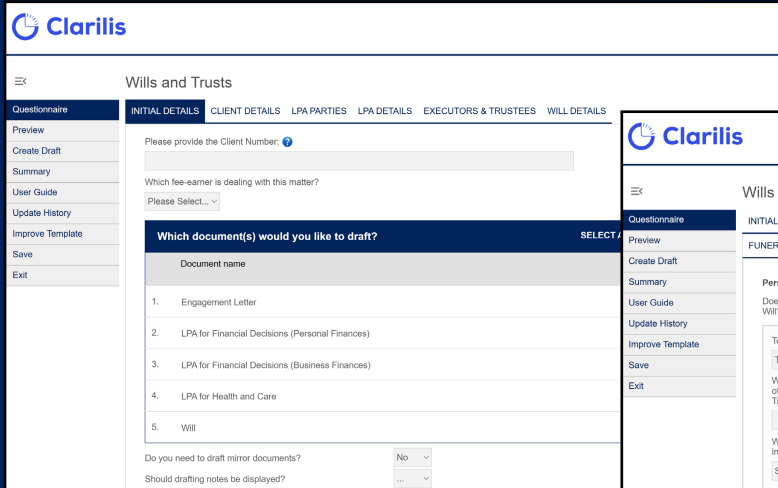
Clarilis provides deep automation of documents frequently drafted by private client teams, such as wills and mirror wills, trust documentation, and Powers of Attorney.

Why automate?

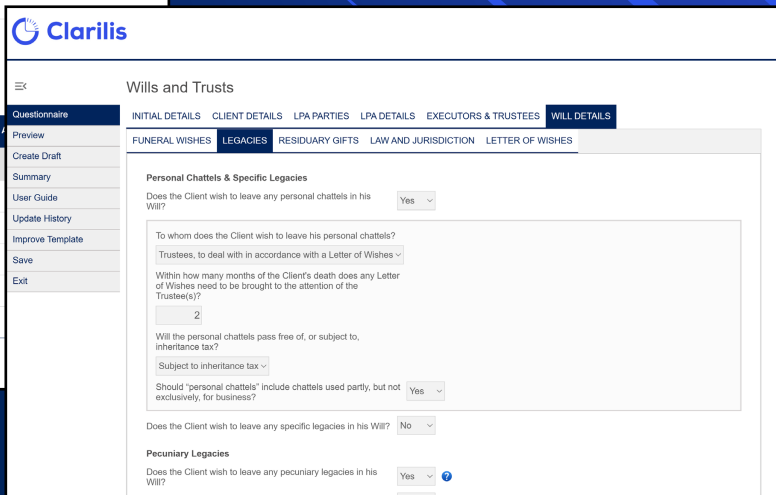
- Drastically reduce drafting time
- Improve margin by working more efficiently
- Price more competitively
- Enable your lawyers to focus on higher-value activities
- Enable delegation in a risk-mitigated environment
- Customised to suit the needs of your firm



Includes
AI Draft



The screenshot shows the 'Wills and Trusts' section of the Clarilis software. It features a sidebar with navigation options: Questionnaire, Preview, Create Draft, Summary, User Guide, Update History, Improve Template, Save, and Exit. The main area is titled 'Wills and Trusts' and includes tabs for INITIAL DETAILS, CLIENT DETAILS, LPA PARTIES, LPA DETAILS, EXECUTORS & TRUSTEES, and WILL DETAILS. A form prompts the user to provide a Client Number and select a fee-earner. Below this, a table lists document types for selection: Engagement Letter, LPA for Financial Decisions (Personal Finances), LPA for Financial Decisions (Business Finances), LPA for Health and Care, and Will. At the bottom, there are checkboxes for 'Do you need to draft mirror documents?' and 'Should drafting notes be displayed?'.



This screenshot displays the 'Personal Chattels & Specific Legacies' section of the questionnaire. It includes questions such as 'Does the Client wish to leave any personal chattels in his Will?', 'To whom does the Client wish to leave his personal chattels?', and 'Within how many months of the Client's death does any Letter of Wishes need to be brought to the attention of the Trustee(s)?'. There are also sections for 'Pecuniary Legacies' and 'Should "personal chattels" include chattels used partly, but not exclusively, for business?'. Each question has a 'Yes' or 'No' dropdown menu.

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