

"ESSENTIALS" VERSION

Authors: Jonathan G. Blattmachr and Michael L. Graham

Practice with Confidence!

Wealth Transfer Planning® (powered by HotDocs®) is the most powerful drafting system for estate planning professionals. Extensive content help is available at every step from the intake dialogs. Our exclusive substantive audio-visual tutorials, recorded by Jonathan G. Blattmachr, elevate the help system to the next level, providing more guidance on advanced and complex topics such as tax planning, tax apportionment, credit shelter trusts, and more.

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WTP Essentials is our most cost effective drafting system for estate planning, with the high technical quality you would expect from the WTP brand. Wills, Revocable Trusts, Irrevocable Trusts, Powers of Attorney, Private Annuity Agreement, and client administrative materials are included. The Essentials version covers the most common planning scenarios for the clients who prefer a simpler plan or have a non-taxable estate.

[See Reverse Side for What's Included.](#)

The Authors

Jonathan G. Blattmachr and **Michael L. Graham** are nationally renowned experts in estate planning and tax law. Both are fellows of the American College of Trusts and Estates Council (ACTEC) and are listed in "Best Lawyers in America." In addition to maintaining active practices and continually enhancing the Wealth Transfer Planning system, they are much sought after speakers at local and national conferences.

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ILS Management, LLC

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Network 9-User	\$4,895	Network 19-User	\$6,895
Network 10-User	\$5,095	Network 20-User	Call for pricing

What's Included

Wealth Transfer Planning -- Forms and Planning Options	Included!
Wills and Revocable Trusts (single and joint grantor) designed primarily for Non-taxable Estates (limited tax planning options)	X
Irrevocable Trusts (with/without insurance) — basic planning	X
Powers of Attorney (state-specific durable and health care powers of attorney, living wills and HIPAA authorizations)	X
Private Annuity Agreement	X
Client Aid Documents (Fee agreements, engagement letters, questionnaire)	X
Support & Training	
Basic web-based training—Functionality and Formatting Classes (web classes)	X
On-on-one coaching (live personal training)	X
12-months maintenance updates	X
30 days Technical & Content Support (live)	X
90-minute one-on-one personal coaching session (using web link)	X
Legal Discussion Forum & Knowledgebase Access	X
Integration with TimeMatters® Feature Package*	X

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