

Elder Law & Special Needs Planning™ Version Comparison Chart

Forms and Planning Options	Standard Version	Pro Version
Wills: Pourover; non-taxable; A/B trust; community & separate property), State-specific options and language, including self-proving affidavits	X	X
Revocable Trusts: Revocable Trusts (single grantor; joint grantors; community & separate property); for non-taxable estates (state-specific options and language)	X	X
Powers of Attorney: Durable Powers of Attorney; Health Care Directives (Powers of Attorney); HIPAA Authorization; Living Wills -- all forms are state specific	X	X
Special Purpose Trusts: Disability Annuity Trust; Donee Trust; Miller Trust; Children's Trust; Income Only Trust; Disability Annuity Special Needs Trust	X	X
Supplemental Needs Trusts: First-Party "(d)(4)(A) Trust" (a/k/a Pay-Back Trust); Third-Party Supplemental Needs Trust; Sole Benefit Trust (3rd party)	X	X
Irrevocable Trusts: ILIT (with/without insurance) — basic planning	X	X
Client Planning & Letters: Checklist for Scheduling Appointment; Planning Questionnaire; Planning Check Plan; Drafts and Asset Protection Plan; Engagement Letter; Fee Agreement; Deed Reserving Life Estate; Re-titling Assets & Changing Beneficiaries; Letter to Insurance Company Confirming Beneficiary Designation; Requesting Annuity; Letter to Physician re Tax Deductible Care; Letter to Attorney Requesting Preparation of Out of State Deed; Strategic Planning Letter; Statement of Intent to Return Home; Disengagement Letter; DocuBank™ Transmittal Letter & Client Enrollment Form	X	X
Memos, Checklists & Miscellaneous: Memo to File re Competence; Memo to File re Undue Influence; Memo to Practitioner re recommendation of using a will or revocable trust; Memo regarding property transfers to minors; Memo regarding transfers in trust vs. outright transfers; Signing Appointment Checklist; Checklist for Closing File; Client Satisfaction Survey	X	X
Elder Law Plan Implementation Documents: Care Agreement, Family Agreement, Multiple Support Agreement, Non-Negotiable Note, Trust Termination Agreement, Reverse Mortgage, Private Annuity Agreement	X	X
Technical & Support	Standard Version	Pro Version
Basic web-based training —Functionality and Formatting Classes	X	X
Basic Technical & Content Support —Live phone and web support for 30 days	X	X
Extended Technical & Content Support —Live phone and web support for 12 months	N/A	X
Legal Discussion Forum & Knowledgebase	X	X
Personal Coaching —90-minute one-on-one coaching session (using web link)	X	X
Customization Tools —functions permitting customizing of language in templates; profiles	X	X
Advanced web-based training —Customization classes	N/A	X
Individual 1+1 License —One License for desktop & second for laptop or home PC (same user)	N/A	X
LISI Services —Free access to Leimberg Information Services (LISI) research tools via web link	N/A	X
TimeMatters® Feature Package Import Feature —third-party feature package, permitting import of data from TimeMatters to InterActive LegalSuite products	X	X

*TimeMatters® Feature Package is a product of Basha Systems, LLC (www.bashasys.com). TimeMatters and Feature Package must be purchased separately.