

# simplifying estate administration.



Estate management is complex. Simplify it with Estate-a-Base, a comprehensive, yet easy to use software solution from Do Process.

Used by many prominent estate practitioners, Estate-a-Base delivers powerful functionality and a streamlined approach to estate management. It automates the Ontario Superior Court Forms as well as numerous other documents to facilitate solicitor's and executor's tasks relating to an estate. The accounting module efficiently produces an array of reports extending far beyond those mandatory for the passing of accounts while the advanced scheduling feature keeps you informed of pending action items.

## estates made simple.

Estate-a-Base is simple to learn and easy to use.

- Streamline your work with automated document production
- Save time with sophisticated tracking and reporting tools
- Includes comprehensive support, upgrades and training
- Risk-free 30 day trial period for new customers



Estate-a-Base has been awarded a *Canadian Lawyer* Reader's Choice Award by legal professionals across Canada who voted for their preferred practice management software.



"Estate-a-Base is a great program and very easy to use. Just as important, your staff have been terrific: responsive both to troubles at this end and to suggestions made. Kudos and thanks to all of you."

*Tatham, Pearson & Malcolm LLP  
Scarborough, Ontario*

### Estate Administration

The Estate-a-Base Administration Module automates and facilitates a multitude of solicitor and executor tasks relating to an estate, making your estate practice easier to manage.

### One Time Data Entry for Documents and Forms

Improve efficiency – Enter data once, then apply the Estate-a-Base automated expertise functionality to produce a wide range of Ontario Superior Court forms\*, correspondence and documents.

### Asset & Liabilities

Streamline tasks – Automate your recording, tracking and preparation of reports relating to an estate's assets and liabilities. Estate-a-Base calculates interest accrued to the date of death, converts asset values from foreign currencies and enables recording of beneficiaries to the subject asset in the event of an in specie distribution.

### Estate Information Form

Estate-a-Base simplifies the preparation of this complex form by populating it with information previously entered. If information changes after the form has been filed with the Ministry of Finance, an amended form will be generated and the amended estate asset value calculated.

### Cost Effective

Save time – Estate-a-Base promptly prepares your correspondence and documents such as declarations of transmission, powers of attorney, CSB redemption forms, and generates reports relating to asset maturity dates, probate values and more.

### Money Matters

Simplify record keeping – The Ledger & Proposed Distribution feature records the estate bank account transactions, other receipts and expenditures, and the allocation of available monies amongst beneficiaries.

### Estate Accounting

The Estate-a-Base Accounting Module with its easy to use interface and powerful functionality produces an array of reports extending far beyond those mandatory for a Passing of Accounts.

Streamline accounting tasks – Effectively manage your estate accounting requirements. Separate capital and revenue transactions, track investments bought and sold on behalf of the estate and prepare Passing of Accounts reports (accepted in Ontario Courts since 2001).

Get started today with a no obligation 30 day trial.

**It's really that simple.**

\*Software upgrades are performed promptly in the event of changes to prescribed forms.

**Ask us about other  
Do Process solutions**

The Conveyancer – do real estate (simply).

Will Builder – wills, the simple way.

Fast Company – manage your corporate practice at high speed.