

All-in-One Automation Platform Appara Launches Estate Planning Solution

Appara Wills leverages the power of AI to make estate planning a breeze.

VANCOUVER, BC, CANADA, April 26, 2023 /EINPresswire.com/ -- Appara, Canada's leading legal entity management and document automation solution, is announcing the launch of its new digital estate planning product. Designed for lawyers, paralegals, law clerks, estate planners, and notaries, [Appara Estate Planning](#) enables accurate and efficient completion of fully customizable estate planning documents; from last will and testaments to trust documents.

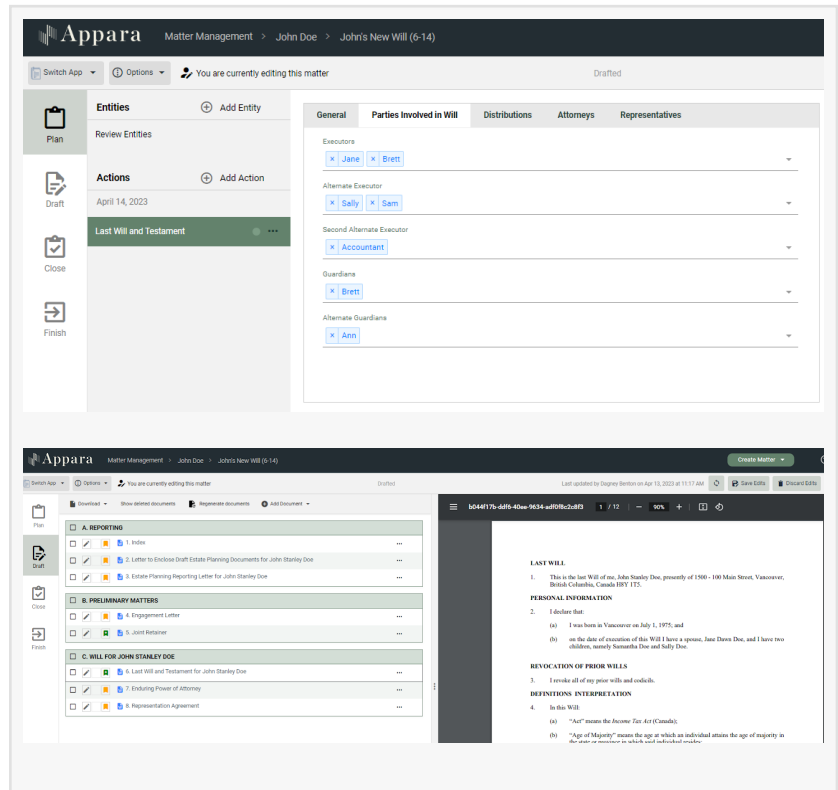
Appara Estate Planning offers electronic questionnaires & intake forms that can be sent to clients in advance – with the information uploaded directly into Appara's database. After client's wishes are entered into the easy-to-use interface, Appara leverages the same artificial intelligence engine behind their Corporate and Real Estate solutions to instantly auto-draft estate documents – including wills, mirror wills, multiple wills, representation agreements, POA, engagement letters, reporting letters, and more.

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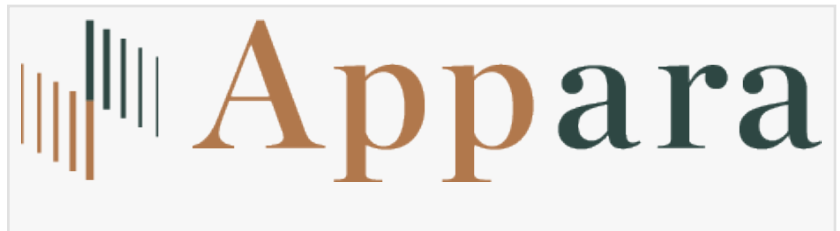
We are excited to be able to leverage Appara's well-established platform to produce automated, customizable, accurate estate planning documents without the need for repeated data entry.”

Dagney Benton

Users can customize Appara's default wills and estate documents by inserting specific clauses from the clause library, or simply bring in their own precedents and clauses. For further personalization, any document can be directly edited within Appara or exported to Microsoft Word and reuploaded. Appara's entire package is fully customizable - enabling users to address any estate planning scenario.



Once documents are drafted, simply send out drafts for clients' approval directly with Appara's Office 365 integration, eSigning integrations (where allowed) or export/print as



PDFs. When documents are signed and the matter is completed, automatic emails can be sent enclosing the final report letter with the executed documents. Copies are stored in the virtual minute book and client records are updated instantly.

"We have heard from our customers that, despite having all of their client information already in their system, they are having to create estate planning documents by hand, risking errors that could take years before they are discovered," says Dagney Benton, Head of Product, Estate Planning at Appara. "Appara's platform has already been rigorously tested and integrates with its well-established Corporate and Legal Entity platform. We are excited to be able to leverage those solutions to produce automated, customizable, accurate estate planning documents without the need for repeated data entry."

Dagney Benton, a lawyer licensed with the Law Society of Ontario, joined the Appara team over a year ago to assist with the expansion of the Corporate platform into the Ontario jurisdiction. Dagney has now moved into the role as the Head of the Estate Planning platform. Prior to joining Appara, Dagney was a lawyer practicing law in the areas of real estate, corporate, and wills & estates in Picton, Ontario for over 12 years. Dagney, along with the Estate Planning Team at Appara, have developed an intuitive, easy-to-use user interface that produces accurate up-to-date estate planning documents in minutes.

In addition to the Corporate and Estate Planning solutions, Appara is also rolling out a Real Estate solution. This allows Appara to provide our customers with a one-stop shop, where a client's information is stored in their records and can be utilized in all areas of your practice, saving time and minimizing errors.

For more information or to book a free trial of [Appara Wills](#), [visit us](#) or email sales@appara.ai.

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