



AbacusNext Estate Planning Suite vs. Generic Legal Software

Troublingly, many legal case management systems are designed as cookie cutters. Sure, you can collect client information, glance at your calendar, and perform activities in a methodical and tedious way, but you also don't quite feel that the system connects the dots. There's an unsettling sense that if you hunt for pertinent information long enough, you might find it in a note, email or saved document. This common concern with basic legal software hurts your firm's profitability by wasting your precious time and introducing additional steps in the way your teams work together. The result is your technology feels expensive because using it doesn't actually save you time or effort as promised.

Thankfully, there is legal practice management software that is specifically designed to manage your estate planning practice in a straightforward way. With a tailored intake process for estate planning cases, calendar workflow automation, easy communications, and document production that follows a logical, collaborative and efficient flow. AbacusNext Practice Automation Suite are tailored to facilitate managing your cases and delivering workflow automation based on the state and county requirements where you practice*. Using an integrated system that starts each activity as a known series of steps, with automated assignments, reminders and alerts that ensure each member of your firm is working together and you always know what happened last and must happen next. Legal technology has evolved far beyond generic platforms that over promise then under deliver with a single piece of your puzzle. AbacusNext PAS software is designed by attorneys and provides all the necessary tools to optimize daily operations and grow your estate planning firm's profits because we've done the prep work for you.

Case Intake



Client information, Spouse contact, Marriage specifics, minor Children, assets and more



Name and address

Calendar w/ Estate Planning



Estate planning specific rules with efficient workflows and court procedures



No automation requires significant time, attention and effort

Client Portal



Share precise case information with your client including invoices, accept payment



Share everything (when available) or incapable of sharing anything

Document Generation



HotDocs - Letters, agreements, pleadings and court filings created in seconds with information you already have



Re-type, copy and paste, mail merges, highly complex and prone to error

Email



Save, share, full text search and easily bill for every sent and received message



Inefficient - Print to PDF, copy colleagues unnecessarily, bounce back and forth from your inbox, separate time entries

Access Controls



Ethical wall, data encryption, role-based permissions



Everyone has access to everything

Billing & Accounting



Track time as you work, send email invoices and receive Electronic payments, real-time dashboard and detailed financial reports



Purchase, install and update your billing, payment and accounting applications while hoping they play nice

Access



- On premise
- Abacus Private cloud
- Abacus Core Cloud

Flexibility to fit your unique needs, budget, and preferences



One way or the highway