



**simplifying estate
administration.**

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

Estate-a-Base delivers powerful functionality and a streamlined approach to estate management. It automates the Ontario Superior Court Forms, the Estate Information Return, and many other documents, uses advance scheduling to keep you informed of pending action items, and produces an array of reports extending far beyond those mandatory for the passing of accounts.

- Streamline your work with automated document production.
- Save time with sophisticated tracking and reporting tools.
- Enjoy comprehensive support, upgrades and ongoing training.

"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

Estate Administration

The Estate-a-Base Administration Module automates and facilitates an array 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 can be generated and the amended estate asset value calculated.

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.

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.

Estate Accounting

The Accounting Module's easy to use interface and powerful functionality produces an array of reports extending far beyond those mandatory for a Passing of Accounts. You can 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).

Publish Legal Notices Faster and Cheaper

The NoticeConnect® integration offers a simple, cost-effective and court-approved platform for publishing and accessing legal notices online. The platform reduces legal liability and estate trustee liability from outstanding creditors with legal notices that reach a wider geographical area for a fraction of the cost of traditional newspaper ads. Accessing NoticeConnect from within Estate-a-Base saves even more time by using the client information already entered to generate notices.



For the fourth consecutive year, Estate-a-Base has been awarded a Canadian Lawyer Readers' Choice Award by legal professionals across Canada who voted for their preferred practice management software.

Get started today with a no obligation 30 day trial. It's really that simple.

Since 1989, DoProcess has focused exclusively on serving the Canadian legal community. Today, DoProcess is the #1 provider of practice specific software for law offices in Canada. Over 15,000 practitioners trust DoProcess applications to manage more than 1.4 million transactions annually. We understand how hard legal professionals work and that's why everything we do is designed to help them complete transactions faster and provide superior service to their clients.