Why Might You Want Legacy Architects?

In the estate planning space, no other major tech platform exists to fully manage every piece of data that goes into one client's estate plan in a **single master place** where both the attorney and client can **collaborate together** and, if desired, sign their estate plan digitally.

Estate planning attorneys traditionally work in a free-form manner with a mix of online forms and word processing files so that they can feel nimble in addressing clients' unique or unusual situations. But in most cases, this means that when you sit down to draft a plan, key and necessary data is scattered in multiple places (which also means clients have to look all over to find what they need to review).

Plus, this free-form approach to estate planning data creates concerns about data security, lack of data integrity, unnecessary administrative and drafting time, last-minute client changes, avoidable errors in legal documents, document signings in non-synced platforms, and **ultimately lost profit.**

To solve all these issues: Legacy Architects is the only cloud-based platform that fully manages every piece of data that goes into one client's estate plan in a single master place where both the attorney and client can collaborate together and sign the estate plan digitally. 🎉

	Legacy Architects v1 (available now)	Legacy Architects v2 (available mid 2024)	Lawmatics Form Builder	DecisionVault
Both parties in a couple have their **own** credentials	Yes	Yes	Yes	No
Comprehensive pre-built intake form **in-app**	Yes	Yes	No	No – basic
Comprehensive pre-built design form **in-app**	Yes	Yes	No	No – build it yourself
Client review and approval of data **in-app**	Yes	Yes	No – must use Word and Excel	No – must use Word and Excel
Can create **custom fields**	Coming in v2	Yes	Yes	Yes
Export of data into Word and Excel, **stylized** for client review	Yes	Yes	No – PDF only	No – condensed export with no explanation of design choices
Document sharing portal	Yes	Yes	Yes	Yes
Global link for account creation	Yes	Yes	No	Yes
Extensive brand customization	Yes	Yes	No – basic	No – basic
Extensive wording customization	Coming in v2	Yes	No	No
Trust **funding** tracking **in-app**	Yes	Yes	No	No
Electronic signature of estate plan documents	Coming in v2	Yes	No	No
Integration/compatibility with automation, CRM and drafting software	Yes – WealthCounsel (more coming in v2)	Yes	Yes	Yes
Lessons, templates, video trainings, office Hours, slack channel **support**	Yes (with upgrade)	Yes (with upgrade)	No	No
Pricing	$197/mo	$197/mo for those from v1 Pricing for v2 TBD	$279/mo or higher	$99-$349/mo

To get started: legacyarchitects.com