LifeCounsel®

Swim Lane Workflow Key

Headers: Separate steps
Lanes: Roles
Templates:

Communication

QA Task Checklist

Legal Document

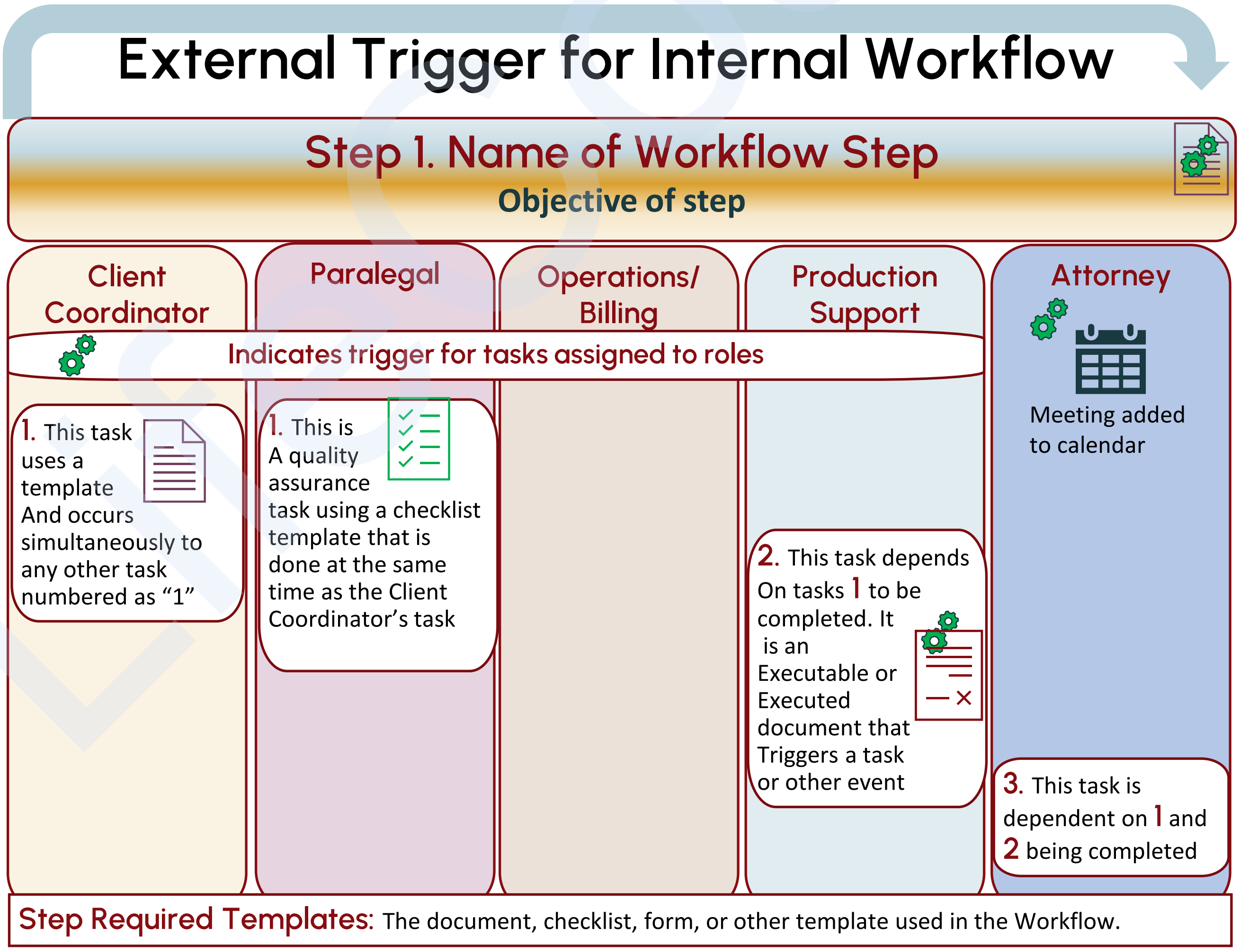
Meeting assigned

Automation

This workflow illustrates assignment of tasks to roles; where quality control comes into play (checklists); and where templates and automations can integrate speed and consistency of communications to reduce friction, duplication of effort, and missed opportunities.

LifeCounsel® is not endorsing a set of practice management tools for the implementation of a workflow. A workflow is meant to enable review of practice tool features to meet the workflow requirements.

How to read through this workflow diagram:



Marketing Activities and Outreach

Step 1. Intake and Engagement

Collect intake data, send engagement documentation, schedule design meeting

Client Coordinator	Paralegal	Operations/ Billing	Production Support	Attorney

Matter created and tasks autogenerated when client submits online intake form

Client Coordinator

1. Send intake packet + engagement agreement

4. Schedule design meeting

Paralegal

2. Verify Intake Completion clean and import data

Operations/ Billing

Trigger: Signed engagement agreement

3. Enter fee, plan type, billing setup

Step 1 Required Templates: Engagement Agreement, Intake Cover Letter, Welcome email script, SMS Reminder Script, Initial Scheduling Confirmation email, Fee disclosure letter

Step 2. Information Gathering

Ensure attorney has everything necessary to conduct design meeting efficiently

Paralegal

1. Review Intake for missing items & assign follow-up tasks to client coordinator

Client Coordinator

2. Request Additional Information: Send checklist of missing items with upload link

Paralegal

3. Optional third-party specialty questionnaires (Supplemental Needs Trust, Elder Law Intake)

4. Notify Attorney of Completed File

Client Coordinator

4. Meeting reminders generated and sent to client

Attorney

5. Pre-meeting review of intake, notes, goals and any uploaded prior plans

Step 2 Required Templates: Missing Information Letter, SNT Questionnaire (if needed), Asset & Liability Worksheet, Family Tree Worksheet

Step 3. Design Meeting

Attorney meets with client, finalizes design, authorizes drafting

Attorney

1. Conduct Design Meeting: clarify fiduciaries, beneficiaries, trust structures, incapacity wishes, funding strategy

2. Enter design decisions into software, complete structured design sheet of planning questionnaire

Production Support

3. Step Change move workflow to Drafting stage

Step 3 Required Templates: Design Sheet, Fiduciary Roles Chart, Plan Summary Handout, Funding Overview Handout

Step 4. Drafting

Attorney and staff draft entire estate plan, verify accuracy, prepare for signing

Roles: Client Coordinator | Paralegal | Operations/ Billing | Production Support | Attorney

Tasks assigned automatically at step change when design meeting marked complete

Client Coordinator

1. Client homework reminders generated and sent to client

Paralegal

2. Primary drafting fields data entry: contacts, relationships, planning choices, trust names, and custom clauses
3. Draft ancillary documents POA, ADHC, HIPAA, guardianship language, memoranda
4. First QC Pass: Technical Review Check merge fields, cross-references, dates, legal names, formatting, bracket errors

Production Support

3. Draft funding package: prepare deeds, assignments, TODs, beneficiary designation instructions

Attorney

3. First draft of core documents Draft trust/ will, RLT/IRT, special planning clauses, and dispositive terms
5. Approval for Signing

Step 4 Required Templates: Core documents (RLT, Will, POA, ADHC, memoranda), Funding Letters, Deeds / RETTD, Assignment of Interests, Email templates for client review requests, Drafting status update scripts

Step 5. Signing Meeting Preparation

Ensure all documents are finalized, printed, and ready for execution.

Client Coordinator

1. Schedule Signing Meeting. Confirm with client.

Tasks assigned automatically at meeting date scheduled

2. Set reminders, confirm ID requirements, give parking instructions

Attorney

2. Final proofread: custom clauses, confirm fiduciaries, check spelling, ensure all revisions captured.

Production Support

3. Assemble signing packet: print, insert witness/notary blocks, attach funding docs, prepare binder authorization

Step 5 Required Templates: Signing Day Checklist, Binder Assembly Checklist, Witness Confirmation Email, Notary Checklist

Step 6. Signing Meeting

Execute legal documents, deliver plan, launch post-signing workflow

Client Coordinator	Paralegal	Operations/ Billing	Production Support	Attorney

Tasks assigned automatically at step change

Attorney
- 1 Conduct signing meeting

Production Support
- 2. Scan and upload final, executed documents.
- 3. Prepare binder same-day client receipt, pickup, or mailing

Client Coordinator
- 4. Send thank-you letter

Step 6 Required Templates: Thank-You Letter, Trust Certificate (if client needs copies), Office Copy Instructions,

Step 7. Post-Signing and Funding Follow-Up

Close the matter, verify funding, schedule review cycle

Tasks assigned automatically at step change + date docs executed

Client Coordinator
- 1. Verify funding completion
- 4. Schedule annual review

Production Support
- 1. Record deeds
- 3. Update custom data
- 3. Send disengagement letter

Step 5 Required Templates: Funding Instruction Letter, Funding Completion Email, Periodic Review Letter (1, 3, or 5-year variants),