Swift

Estate Planning Services

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Swift Estate Planning Services Ltd
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Home Diary Manage Cases Manage Clauses Support

Welcome to Swift
Estate Planning Services

Please select one the options shown above.

Who are Swift Estate Planning Services?

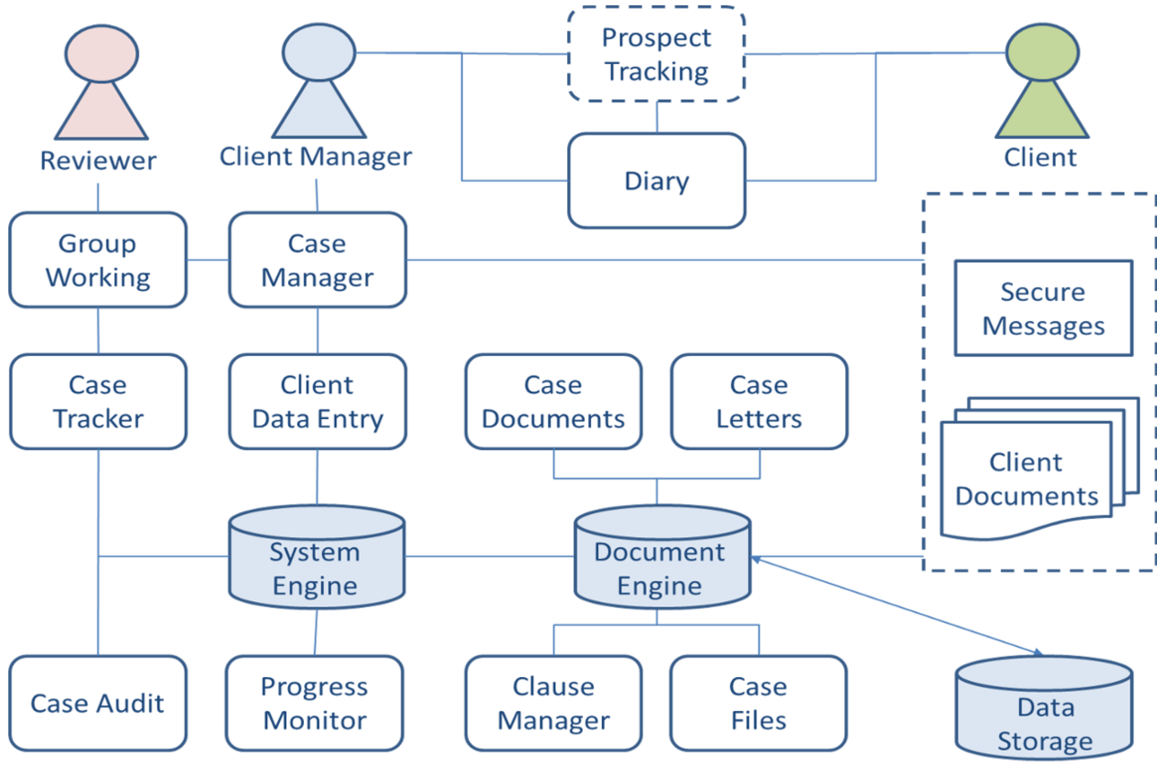
Our expertise lies in providing innovative Document and Case Management systems and services, designed to optimise all aspects of the document production process, within the specialist fields of Private Client and Estate Planning.

Our systems are designed to actively minimise the workload involved in client data entry and document production; providing accuracy, efficiency, and a comprehensive structured format – all encompassed within a sleek, modern cloud-based systems.

We have over thirty years of experience developing, building and supporting IT systems, and over ten years of specific experience providing Private Client and Estate Planning software and services.

What is the Swift Estate Planning Service?

The service is an extensive cloud-based software system that provides the user with all of the tools required to build a Will or other related estate planning document. It is organised into three main modules:



Case Management System – This is the backbone of the system and consists of a series of data entry screens that are, in essence, building blocks to build the actual case. Data from these screens is used to produce the client Wills, Lasting Power of Attorney and other related estate planning documents.

Secure Client Portal – The secure portal module is designed to give the client and client manager the ability to communicate within a dedicated, secure messaging environment, and to enable the client to download and view documents produced for the validation of content.

System Storage Portal – All cases, Wills, LPA's and other documents will be stored on our servers, available for instant "anytime" access by the client manager. Note, all case data, files and documents remain the property of the licence holder to which the client manager (the user) belongs.

What are the features of the system?

Home | Manage Cases | Case Home | Case Documents | Case Letters | Case Files | Client Manager | Case Audit

- A document production engine capable of producing; Single and Mirror Will documents, Lasting Power of Attorney, Severance of Tenancy, Advanced Care Plans and other related estate planning documents.
- A cloud-based platform with storage and bank-level certified security, providing access to the system, case data, documents and files from anywhere at anytime of the day and week.
- Easy to navigate case construction screens allowing sectional amendments, information updates and data replication.
- Progress indication with automatic data and content scrutiny, including quality controls for incomplete / inconsistent data formation or input.
- Company-branded secure client portal to provide communication, data and documentation exchange between the client and client manager.
- Create client correspondence using standard letter template library.
- Ability to add and store external case files and documentation (such as scanned documents).
- Efficient case management facilities allowing hierarchal / group notification and visibility.
- Independent review and sanction segregation.
- Case progress tracking and monitoring.
- Integrated client manager diary facilities.
- An integrated clause editor with manual clause inclusion / exclusion facility.
- Automatic logging of changes, case amendments and document production providing a full and complete audit trail.
- Step-by-step tutorials and extensive context-sensitive user guides.

System design and navigation

Home | Manage Cases | Case Home | Case Documents | Case Letters | Case Files | Client Manager | Case Audit

Edit Case

Case Home & Tracker
Testat[illegible]etails
Spou[illegible]rtner Details
Security Details
Essential Client Details
Client Financial Estate
Executor/Trustee Details
Children/Minor Details
Guardian Details
Legacy Beneficiary Details
Residue Beneficiary Details
Alternate Beneficiary Details
Main Residence Life Tenant
Remainder-men Details
Power of Attorney
Properties & Tenancies
Storage & Payments
Advance Care Planning
Additional Client Details
Case Notes

The non-linear design and sleek operation provides the user with the facility to navigate around the system freely. Although the system is structured to follow a logical sequence of case construction, the flexibility exists to open, close and jump to previous or future sections as the user demands.

With the focus of the software being on ‘ease of use’ and ‘accuracy of content’, the construction of a case is designed to be as ergonomically user-friendly as possible.

The system and document engines formulate the clauses within each section behind the scenes and automatically generates clauses and information into the Will document. This enables questions to the client to be kept as straight-forward as possible.

Fast navigational buttons enable the user to quickly access sections, not just on the specific case, but across the entire management system. For example, a click of the mouse will open documents, files or the case management screen.

Next
Notes
Progress

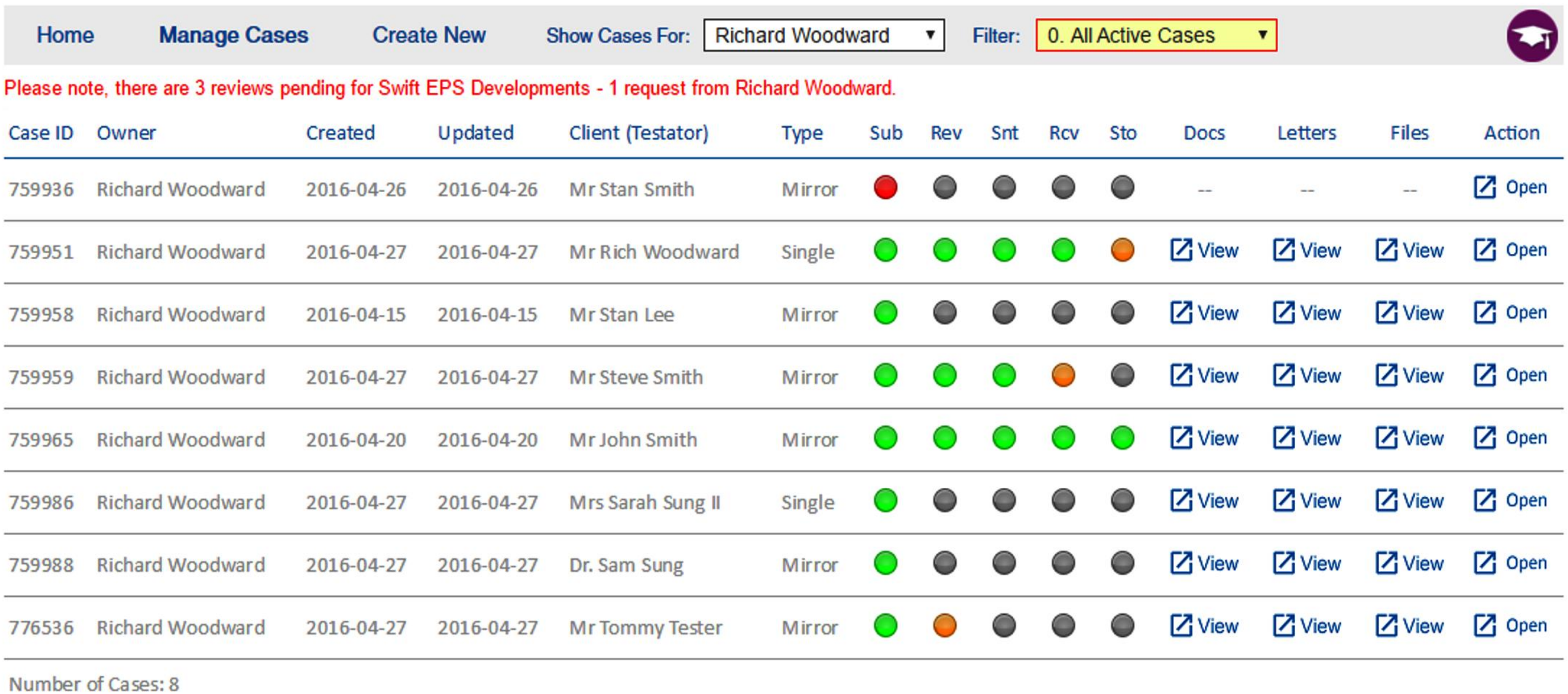
Next >

Case management and group working

To ensure the complete visibility of on-going cases, each case manager has visibility of a group case management screen, which offers an instant overview of cases in-progress, completed or in need of attention.

The system provides up-to-date case status identification, easy to access case documentation, a group / hierarchal notification system plus alerting of requested independent reviews.

To promote team-working within a group environment, the case management and case tracker functions allow multiple case managers to work on a single case when required.



Case ID	Owner	Created	Updated	Client (Testator)	Type	Sub	Rev	Snt	Rcv	Sto	Docs	Letters	Files	Action
759936	Richard Woodward	2016-04-26	2016-04-26	Mr Stan Smith	Mirror						--	--	--	Open
759951	Richard Woodward	2016-04-27	2016-04-27	Mr Rich Woodward	Single						View	View	View	Open
759958	Richard Woodward	2016-04-15	2016-04-15	Mr Stan Lee	Mirror						View	View	View	Open
759959	Richard Woodward	2016-04-27	2016-04-27	Mr Steve Smith	Mirror						View	View	View	Open
759965	Richard Woodward	2016-04-20	2016-04-20	Mr John Smith	Mirror						View	View	View	Open
759986	Richard Woodward	2016-04-27	2016-04-27	Mrs Sarah Sung II	Single						View	View	View	Open
759988	Richard Woodward	2016-04-27	2016-04-27	Dr. Sam Sung	Mirror						View	View	View	Open
776536	Richard Woodward	2016-04-27	2016-04-27	Mr Tommy Tester	Mirror						View	View	View	Open

Number of Cases: 8

Secure client portal

With the client in mind, the system provides a secure portal, allowing the client to "login" to a company-branded website to access their documentation. Within the portal, the client manager and client can converse electronically and share information. In addition, the client can view draft or final copies of their documents and case files.

The client portal is equipped with the same level of security as the main case management system and is governed by the client manager. The "Swift Estate Planning Services" branding is removed in the client portal.

Your company logo here

Home Case Home **Client Home**

Case Documents

Your welcome screen message here

Case Home
Client Home
Secure Messages
Draft Documents
Final Documents
Client Notes

Should you have any questions or requests about your case, or any difficulties using our service, then please contact your advisor:

Your company information and contact details here

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Telephone: 0330 9000 808
Email: support@swift-eps.co.uk
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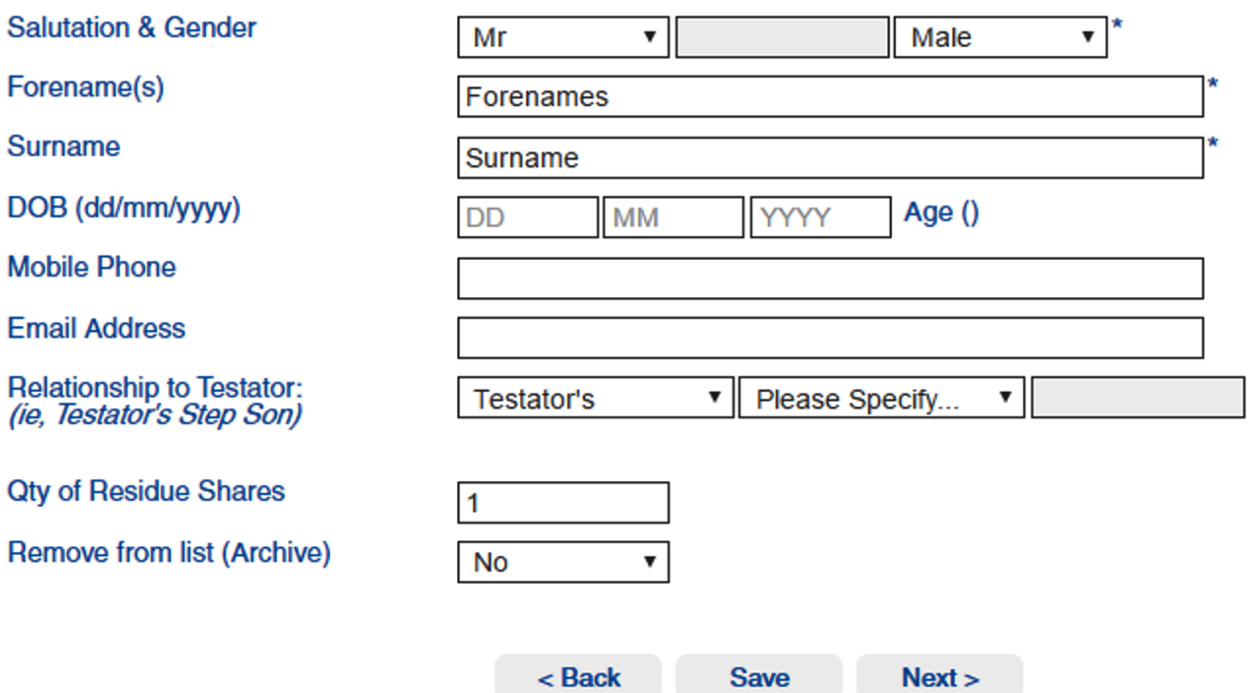
Photograph of the Client Manager here

Easy to use data entry and automated data replication

To ensure efficiency when creating cases, Wills or documents, the data entry screens are designed to be easy to complete and navigate, with free text boxes and dropdown selection boxes wherever possible.

The screens used for the entry of data are purposely designed to offer consistency to the client manager when building the case. By maintaining an organised set of questions to the client, confusion or misinterpretation of answers is minimised.

All nominated delegate data entered into the system will be stored along with the case, meaning, personal details need only be entered once. The same information can then be selected or inserted elsewhere - with the click a button - to fulfil the requirement of that section.



Case progress and error checking

Requirement	Status	Requirement	Status
Testator Details Specified		Residue Beneficiaries Specified	
Spouse/Partner Details Specified		Alternate Beneficiaries Specified	
Security Details Specified		Remainder-men Specified	
Essential Client Details Specified		Main Residence Life Tenants Specified	
Financial Estate Details Specified		Power of Attornies Specified	
Executor/Trustees Specified		Properties & Tenancies Specified	
Children/Minors Specified		Storage Plans Specified	
Guardians Specified		Invoice & Payments Specified	
Legacy Beneficiaries Specified		Funeral Plans Specified	
People Details Check		Address Details Check	

Number of Activities: 20

The Swift Estate Planning Service has an in-built progress and error checking algorithm, meaning, all information entered into the case construction screens will be checked and assessed automatically for completeness and for accuracy of content.

To ensure the quality of a case, the system actively prevents submission if important information is missing or incorrect.

The progress screen also provides instant feedback to the user should any errors exist. The user can jump into specific sections and amend details directly in order to then proceed with the case.

The system works as an automated "check" to ensure the correct information is taken forward for document production.

Testator Details Specified		Residue Beneficiaries Specified	
Spouse/Partner Details Specified		Alternate Beneficiaries Specified	
Security Details Specified		Remainder-men Specified	
Essential Client Details Specified		Main Residence Life Tenants Specified	
Financial Estate Details Specified		Power of Attornies Specified	
Executor/Trustees Specified		Properties & Tenancies Specified	
Children/Minors Specified		Storage Plans Specified	
Guardians Specified		Invoice & Payments Specified	
Legacy Beneficiaries Specified		Funeral Plans Specified	
People Details Check		Address Details Check	

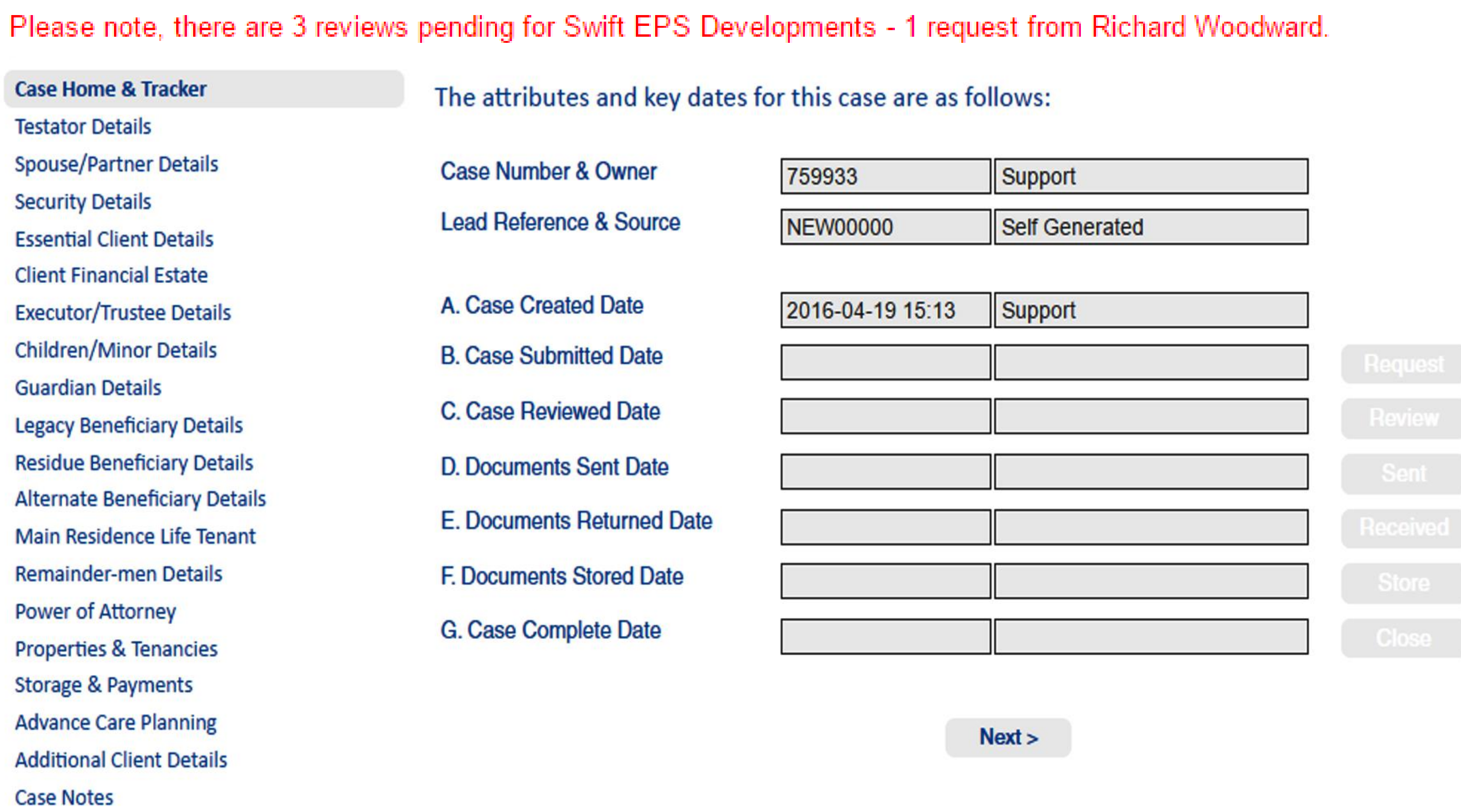
Number of Activities: 20

Structured workflow and independent review

The case tracker incorporates a structured workflow for the fulfilment of each case by requesting and documenting the completion of each key stage of work.

The case tracker provides immediate feedback on the current state of a case including date and time stamps along with the case manager (user) who signalled the completion event.

Given quality assurance is a key factor in legal document creation, the system is designed to request an independent case review prior to document creation. Once a case is submitted for review, a red “pending review” banner (shown below) is displayed amongst the group to prompt a case reviewer into action.



Mobile

The system operates within a cloud platform, enabling secure access from anywhere, using any sizeable device with an internet connection. Should the user's device become unusable, or should the user wish to login from an alternate or remote location via the web-based login facilities, all their information will be instantly available from the new device.

Editable

Clauses are inserted into the case automatically depending on how each section is completed. However, the opportunity exists for the case manager to modify the clauses to ensure the terminology fits the client's requirements. Automatic inclusion and exclusion of rules can also be modified.

Safe and secure

Built-in to the system are safeguards and security fortification equivalent to that of the banking industry. We understand that the information we hold is of a personal nature and have put systems and processes in place to ensure all data is protected accordingly.

All access is restricted except where necessary and security measures designed into the system to protect and shield from theft or cyber-terrorism.

Documents and case data are backed up repeatedly from our servers to an independent location to minimise the risk of data loss due to system failure.

Swift Estate Planning Services take a firm stance regarding information sharing. No data provided to Swift Estate Planning Services or stored on our servers will be shared externally with any third-party.

Why should you chose Swift Estate Planning Services?

- We provide an extensive management system to support the needs of your estate planning business.
- We structure the entry of your client data to make it as simple and as straight-forward as possible. You never need to enter the same information more than once. Simple, intuitive design is our aim.
- We understand that learning a new system can be daunting so, we provide you with step-by-step tutorials plus context-sensitive user guides to minimise the time it takes to start using our system.
- Case work can be organised across your group(s) to balance workload and to minimise the impact of any planned or unplanned absences on your clients.
- We allow you to communicate with your clients via our secure client portal – supplementing the service you offer and reducing work where possible.
- Our case tracker facility allows your to monitor the progress of your case-work to ensure that client and company service levels are maintained at all times.
- We provide an environment that is available whenever you are - twenty-four hours a day, seven days a week from any sizeable device that has an internet connection.
- We have an on-going development programme to ensure that changes in legislation, general practises and technology are factored into the products and services we offer.
- We understand that businesses change so, you can grow or reduce your licence coverage with us over time as the needs of your business change and evolve.
- Should you need something more, we are happy to discuss any bespoke requirements you may have to ensure our products and services operate seamlessly in your business.

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