

# ESTATES&TRUSTSSOURCE™

## BUILD-A-WILL QUICK REFERENCE CARD

### WestlaweCarswell

State-of-the-art Build-a-Will application on Estates&TrustsSource allows you to generate superior quality, authoritative, court-ready documents in a matter of minutes.

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[www.westlawecarswell.com](http://www.westlawecarswell.com)

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## 01 ACCESSING BUILD-A-WILL

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1. Open your browser and access: [www.westlawcarswell.com](http://www.westlawcarswell.com) and click **Sign-On WestlawCarswell**.
2. Enter your password and client identifier into the fields provided and click **Sign On**.
3. Click the **Build-a-Will** link located in the **Estate Planning** section of the **Estates&TrustsSource** Home page.

**Note:** You may also access Build-a-Will from the **Related Info** tab of any Histrop document.

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## 02 THE BUILD-A-WILL HOME PAGE

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Build-a-Will is a separate application. It opens a new window upon launch.



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**Sign Out:** Click this link to exit Build-a-Will.

**Home Page:** Click this link to retrieve the Build-a-Will Home page.

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**Create/Edit a Will:** Click this link to create or edit an existing will.

**Will Templates:** Click this link to create, retrieve or delete a template.

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**Firm Information:** Click this link to input or edit your firm's information.

**Help:** Click this link to retrieve the Build-a-Will Quick Reference Card.

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**Licensing Policy and Privacy Policy & Data Security:** Click the appropriate link to view our software policies.

**Publisher's Note:** Click this link to retrieve information about recent updates to the will clauses.

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### 03 CREATING A WILL

1. Click [Create/Edit a Will](#) in the left frame or in the upper right corner of the screen.

**Note:** You must enter your firm's details on the Firm Information page prior to creating your first will. See *Firm Information* for more information.

Click [Create/Edit a Will](#)  
to begin creating a will



Click the appropriate button to create a new will, open an existing will, delete or download a will.

The [Create/Edit a Will](#) page appears listing wills that are currently in progress.

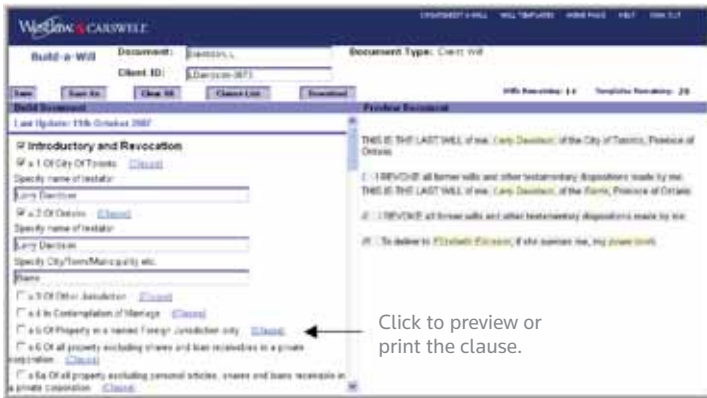
2. Click the [New](#) button located above the chart in the right frame. The [New Client Will](#) page appears in a separate window.



3. Enter the [Client Document Name](#) and [Client ID](#) in the fields provided and click [OK](#). A list of clause types appears in the left frame along with the client information at the top of the page.



4. Select the specific clause type you want in the left frame to see its details and enter applicable information as prompted. The full text of the clause along with the information you entered appears in the right frame.



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Click **Save** to save your will within Build-a-Will.

Click **Clause List** to view only those clauses you selected for your will in the right frame.

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Click **Save As** to save your will with another name or save it as a template.

Click **Download** to download your will to your computer.

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Click **Clear All** to reset your clauses.

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You can pick the clauses you need in any order – Build-a-Will orders and numbers them appropriately.

5. When finished, click **Download** to download your will onto your computer and save it as an .rtf document. You may open, edit, if necessary and print the document in Word or WordPerfect.

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## 04 SAVING A WILL

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To save a will, click **Save** or **Save As**, whichever is applicable to your situation.

Click **Save** to save the will within the Build-a-Will application and continue working on it.

Click **Save As** to save the will (within the Build-a-Will application) with another name or save it as a Template (See *Creating a Template* below for more information). You can create and save up to 30 will templates designed to address recurring situations.

You can save wills in progress within the application, subject to a limit of 20 documents.

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## 05 CREATING A TEMPLATE

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You can create and save up to 30 templates in Build-a-Will. Templates contain clauses that are reused across multiple client wills; thereby removing the task of having to create each will from scratch.

1. After creating a will, click **Save As**.

The **Save as Client Will** or **Template** page appears.



2. Enter the document name and select the **Template** radio button.
3. Choose whether to save the clause selections only or your answers as well.
4. Enter a description in the box provided, if you wish.
5. Click **Save**.

To access **Will Templates**, click [Will Templates](#) in the left frame or upper right corner of the screen.



## 06 SAVING A TEMPLATE AS A WILL

1. While in the template, click the **Save As** button at the top of the template page.



The **Save as Client Will or Template** page appears.



2. Enter the **document name** and select the **Client Will** radio button.
3. Enter a **Client ID**.
4. Click **Save**.

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## 07 FIRM INFORMATION

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Enter your firm's details on the Firm Information page. This information will populate the back page of each will you create.

1. Click [Firm Information](#) in the left frame of the Home page to access the Firm Information page.

The screenshot shows a web application interface for entering firm information. The page title is "Firm Information". On the left, there is a navigation menu with "Firm Information" selected. The main content area contains a form with the following fields and values:

Field	Value
Last Name	SMITH
First Name	John and Associates
Firm Address	1234 Main Street
Firm City	New York
Firm State	NY
Firm Zip	10001
Firm Phone	(212) 555-1234
Firm Fax	(212) 555-5678
Firm Email	john.smith@smith.com

At the top right of the form area, there are "Save" and "Cancel" buttons.

2. Enter your firm's details in the fields provided.
3. Click [Save](#).

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## 08 WHERE DO I FIND HELP?

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For technical or reference support or to inquire about training, contact Carswell at:

**Toll-Free:** 1.800.387.5164  
**In Toronto:** 416.609.3800  
**Online:** [www.carswell.com/email](http://www.carswell.com/email)

WestlaweCarswell

[www.westlawecarswell.com](http://www.westlawecarswell.com)

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