

# Cut Will Creation Time by 60% with Clio Draft

Company name: Paul Wigg-Maxwell, Law Office of Wigg-Maxwell Esq.

- Number of Staff: 2-5
- Location: Chatham, NJ, USA
- Fee Types: Flat Fee
- Practice Areas: Trusts and Estates

## How an Estate Planning Attorney Improved Efficiency and Profitability

### Situation

Helping people has been a lifelong mission for Paul Wigg-Maxwell. After law school, that mission came to life in the form of improving legal access for the members of his community.

There was just one downside: The time it took to support his clients in their estate planning matters was losing him money. He needed to find a sustainable way to continue providing best-in-class legal services to his clients while still coming out on top himself.

### Solution

As part of Paul's estate and trust planning services, he provides his clients with professional wills on a flat-fee basis. While the flat-fee structure satisfies Paul's goal of opening up his services to more people, the work he puts into them costs him more than what he was charging his clients.

*"It's hard to do a good job on a will without spending 10 hours of professional time," he says. "At 10 hours, I'm losing money on every will I write."*

Creating a will takes a lot of attention to detail, to say the least. And while collecting those details from clients and putting them to work was something Paul excelled at, he quickly discovered that the manual process of creating a will was tedious and time-consuming. Paul also found that simple errors were piling up using traditional desktop publishing software like Microsoft Word—errors that could cost him the trust of his clients.

That all changed with Clio Draft.

## Results

Once Paul started using Clio Draft, he was able to turn his existing repository of legal documents into dynamic templates he could generate more quickly—shaving off hours of work per client.

*"By putting my will in Clio Draft, I can cut down the time it takes to generate a will from 10 hours to about 4 hours," he says. "Now I've gone from losing to making money on every will I write."*

Beyond saving him time, Clio Draft reduces errors for Paul when he generates documents. Once he has the pertinent client information, he uses Clio Draft's web-based interface to enter all the info once before it flows automatically to the correct places in the document. For Estate Planning, this has to go well beyond simple mail merge functionality.

With Clio Draft, Paul can automatically add or remove clauses with the click of a button, or edit finer details within a clause directly from the Clio Draft interface. What's more, he can have peace of mind knowing that the language he's using is consistent and accurate from client to client.

The final product is quickly and automatically generated, and can be downloaded to Microsoft Word or sent out for client signature directly from within Clio Draft.

For Paul, Clio Draft has meant turning a loss into a profit. But best of all, it has freed him to do what he loves most about being a lawyer—helping as many people as he can.

## Interested in learning more about what Clio can do for your firm?

[Book a demo today](#)

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### Getting started with Clio is easy

Clio's cloud-based solutions are free to try, and the company offers a large roster of support, training, and practice management experts. The Clio team has helped tens of thousands of law firms get up and running—including migrating data from other software providers.

To see how Clio can help you manage and grow your firm, [schedule a free demo](#) at [clio.com](https://clio.com), call 1-888-858-2546, or email [sales@clio.com](mailto:sales@clio.com).