

MITRATECH

Automated Client Data Intake: The Wills for Heroes Story

How Wills for Heroes standardized their client intake form to produce legal documents faster for the first responders they serve

MITRATECH
HotDocs



The Company

Wills for Heroes was established after the September 11th attacks when it became evident that many first responders, such as firefighters, law enforcement officers, and paramedics, lacked even basic estate planning documents. The Wills for Heroes program was developed to address this gap by providing essential estate planning services to those who risk their lives for others.

The 501(c)(3) charitable nonprofit **Wills for Heroes Foundation** supports the Wills for Heroes program in Dayton, Ohio, and in 29 other states. By helping first responders plan now, they ensure their families' legal affairs are in order in the event of tragedy.

The Challenge

The organization schedules clinic-like meetings with first responders and their spouses or partners. After these meetings, they provide essential legal documents free of charge to the nation's first responders, including wills, living wills, and powers of attorney.

But without user-friendly, automatic document generation, the process would be extremely cumbersome. In 2001, Eric R. Blaine, the lead attorney and trainer at the Dayton branch of Wills for Heroes, partnered with HotDocs to improve the process. HotDocs donated software to Wills for Heroes and later provided all new licenses to the organization.



The Solution

Wills for Heroes implemented HotDocs with key functionality in mind:

1. **A user-friendly intake form that could transform guided conversations into legal documents**
2. **Automatic document population and document generation to reduce time to complete and mitigate intake errors**

With HotDocs, the sessions take anywhere from 20 minutes to one hour. During this time, client data is entered into HotDocs and then automatically populates other documents as needed. In one conversation, clients can finalize a last will, durable or financial power of attorney, health care power of attorney, living will, and donor enrollment registry form.

Forms are then printed, notarized, and witnessed. The first responder and/or spouse or partner leave with all original documents.

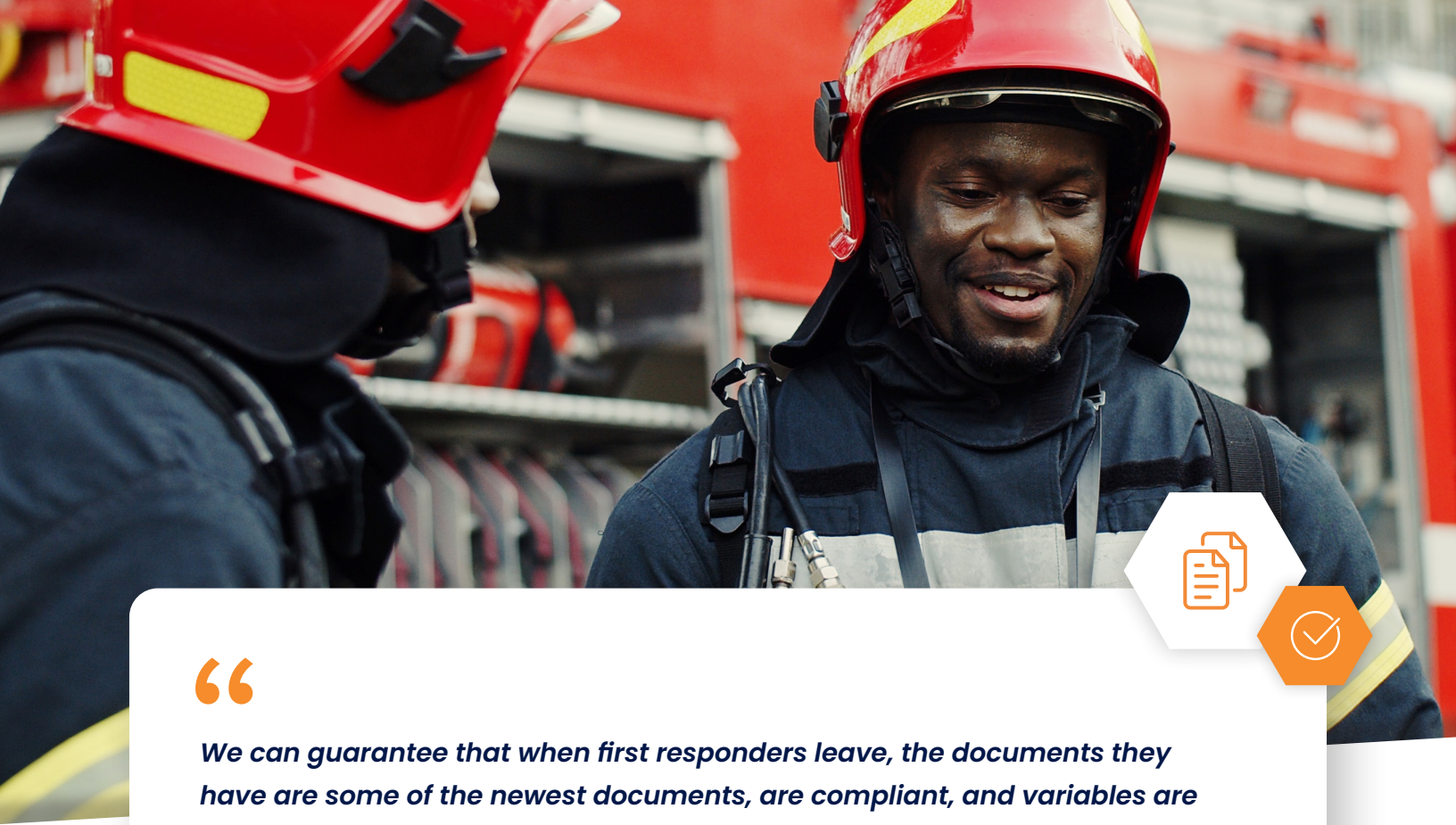
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HotDocs absolutely streamlines the intake and the efficiency of the program. The templates focus our attorneys and volunteers and provide them with guidance to ask the right questions and keep within the scope of the program”

ERIK R. BLAINE,

LEAD ATTORNEY AND TRAINER





“

We can guarantee that when first responders leave, the documents they have are some of the newest documents, are compliant, and variables are minimized. Without HotDocs, we could not do that.”

ERIK R. BLAINE,

LEAD ATTORNEY AND TRAINER

The Results

With Mitratesch HotDocs implementation, Wills for Heroes has been able to:

- **Reduce the legal document creation process to between a 20-min and 1-hour meeting**
- **Expand the kinds of attorneys who can easily work with Wills for Heroes**
- **Draft over 2,000 estate plans**
- **Grow the program to include estate planning with veterans**

With tMitratesch HotDocs, a standardized form guides the conversation between the attorney and the client, resulting in a shorter meeting. This guided experience ensures that the correct information is captured and that any relevant data automatically populates into other forms. As a result, it takes less time to fill out these forms and there are fewer opportunities for error.

Standardization also has made it easy to empower attorneys who are not primarily estate planning practitioners to participate in this pro-bono work. With just one and a half training on the subject matter and on HotDocs, attorneys are ready to help.

The Wills for Heroes program in Dayton, Ohio, drafted 2,000

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I've loved being part of this program and can say that without HotDocs, the manual completion of these documents would be cumbersome to say the least."

ERIK R. BLAINE,
LEAD ATTORNEY AND TRAINER

estate plans for first responders and spouses or partners free of charge before 2020. The number has continued to grow since.

Finally, the success of the program has led to its expansion.

The Wills for Veterans program was created in 2017 in conjunction with the Dayton VA and the federal court. This program, like Wills for Heroes, has been well received in the community and has helped ensure that more people have access to critical legal documents.

Are you ready to elevate your intake forms and automate your document assembly and generation?

We can help.

Get In Touch

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"These programs have brought the legal community together with area first responders and veterans from Ohio,"

CHRIS ALBREKTSON,
ASSISTANT EXECUTIVE DIRECTOR
DAYTON BAR ASSOCIATION



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