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The Center for Disability and Elder Law (CDEL) Launches Estate Planning Documents App Developed by Chapman's Innovations Team

Chapman's innovations team automates the generation of essential estate planning documents to help CDEL expand access to estate planning services for underserved people in Illinois.

CHICAGO, September 14, 2020 — In collaboration with the Center for Disability and Elder Law (CDEL) and Thomson Reuters, the Practice Innovations team at Chapman and Cutler LLP is pleased to announce the launch of a new app developed to help CDEL staff attorneys and pro bono volunteers expand access to estate planning services for persons marginalized by poverty, age, and/or disability in Illinois.

Preparing wills, power of attorney documents, and Transfer on Death Instruments (TODIs) requires legal knowledge of estate planning, which can be daunting for volunteer attorneys whose expertise is primarily in other areas of the law. Each year, more than 300 volunteer attorneys assist with estate planning services, and CDEL expends time to train, answer common questions, and review and revise documents prepared by volunteers. Chapman's Pro Bono Counsel Sara Ghadiri and the Chapman Practice Innovations (CPI) team came up with a scalable solution: an app, built upon Thomson Reuters Contract Express, that automates and streamlines the drafting of customized estate planning documents and provides real-time guidance for pro bono volunteer attorneys to help advise their clients.

App development is one of the ways the CPI group improves legal processes with technology, both for clients and internal operations at the firm, so it made sense to tap the Practice Innovations team for the CDEL project. "It was a natural fit for Chapman," said Ghadiri. "I knew there were ways we could contribute our experience from our Practice Innovations team and our Trusts and Estates knowledge to make a tool that could increase CDEL's reach. We hope by making it easier for volunteer attorneys to draft high-quality documents, it will lower the anxiety barrier and help more volunteers get involved."

Chapman first reached out to CDEL to propose the idea in April. "The generosity of Chapman came at a vital moment for CDEL as we were working to transition much of our work to the remote environment," explained CDEL's Executive Director Caroline Manley. "COVID-19 has had a devastating impact on CDEL's clients, so the opportunity to create more efficient systems to deliver our services was a true gift."

Eric Wood, Chapman's Practice Innovations and Technology Partner, agreed: "Helping legal aid organizations scale their ability to assist their clients by coding legal logic and building tools to automate common legal processes is a great way for us to contribute our know-how for the benefit of people in need. We've seen the transformative power of legal technology in our day-to-day work, so it has been exciting and rewarding to apply it to our pro bono initiatives."

CPI Senior Analyst R. Amani Smathers managed the project and developed the app at Chapman. "This was a wonderful opportunity to use our document automation expertise to benefit our community," she said. "It's also a new model for pro bono services. In addition to the traditional model of providing pro bono attorneys for 'one-on-one' legal services, firms with legal technology teams can help create 'one-for-many' solutions that help legal aid organizations streamline and scale their processes."

Smathers consulted Rebecca Wallenfelsz, Chapman's Pro Bono Partner and partner in the firm's Trusts and Estates Department, and CDEL's estate planning team to draft the questionnaire and provide guidance on the language and legal logic in the documents. "The app is designed to be used by CDEL staff or

volunteers, and it includes guided instructions so no matter what a volunteer attorney's practice is, they can work through our app with a CDEL client and generate the estate planning documents they need," said Rebecca Wallenfelsz. "Apps like this are win-win-win. The app makes the volunteer process easier for both the volunteer attorneys and CDEL, and it helps CDEL provide timely, high-quality legal documents and advice to clients."

The app will allow CDEL to continue its programming during a pandemic that requires many of their most vulnerable clients to remain quarantined. Cheryl Lipton, CDEL's Pro Bono Coordinator remarked, "Many of our programs relied on the ability to meet with our clients in workshop settings, which is currently impossible. We are so excited to incorporate the app into our reimagined programs and know that our volunteers and our clients will benefit from the incredible work of Chapman's CPI team."

About Chapman and Cutler

Chapman and Cutler LLP, founded in 1913, is a national law firm that is focused on financial services transactions and clients and is a firm on the leading edge of legal services innovation. Chapman's Practice Innovations team designs and develops platforms for contract automation and review and analysis, builds custom applications, and connects systems as needed to deliver solutions such as dashboards, transaction management, and online collaboration systems and has also built market-ready software for use in financial transactions. For more information, please visit www.chapman.com.

About the Center for Disability and Elder Law

In its 36-year history, more than 30,000 people with disabilities and senior citizens have received free legal services from CDEL. CDEL provides the majority of its services in the communities where its clients live, and engages the Chicagoland pro bono community in all of its programming. For more information, please visit www.cdela.org.