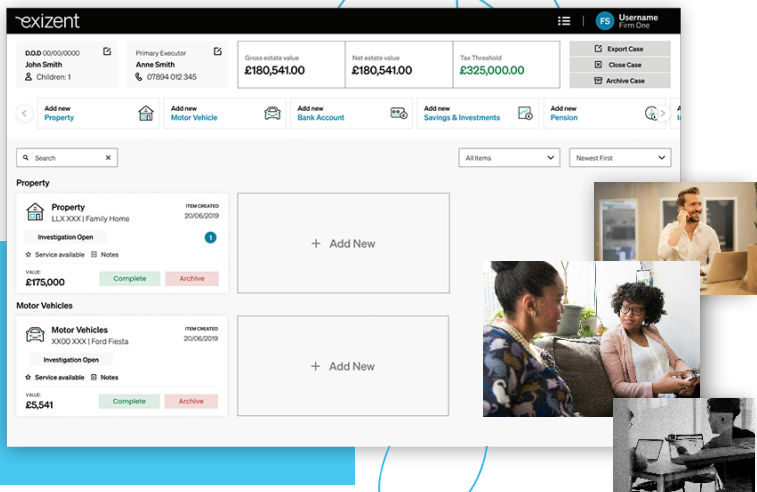


Save over **3 hours*** per case with our automation of forms and accounts.



Specialist software
for bereavement



No more form drafting - with our auto-completion of court and IHT forms



Save time - with our automated Estate Accounts package produced to STEP guidelines



Get real time financial data and valuations - with our 3rd party integrations



Generate correspondence - with dynamic fields pulling data directly from the case



Drive efficiency - with case dashboard and specialist interface



Organise teams - assign roles and cases to improve focus

Specially designed for legal teams, our straightforward cloud-based platform allows you and your team to streamline and efficiently deal with the administration of a deceased's Estate across the United Kingdom, without the need for intensive training or complicated configuration.

Generate completed Inheritance Tax and Court forms

Exizent features comprehensive form automation functionality that covers your most frequently used forms. Our form automation is seamless, automatically updating all your forms whenever data is added to your case or updated, removing the need to manually reproduce forms or use other tools and helping reduce any risk associated with incorrect data being submitted. We produce:

Court Forms:

- + PA1A & PA1P forms for estates within England and Wales
- + C1 & C5 forms for Scottish Estates

IHT Forms and Schedules:

- + IHT400 Tax Form
- + IHT Schedules that feed into your IHT400
- + IHT205 for legacy cases
- + C4 Corrective Accounts
- + IHT 30, 35, 38
- + All transferable nil rate band schedules (IHT216, 217, 435, 436, 402)

To ensure you are always working with the correct material our forms are quickly updated to account for published changes from either the courts, or HMRC.

exizent

*Average time saving is based on manual production of court forms, IHT400 Inheritance Tax forms and Estate Accounts within a testing environment.

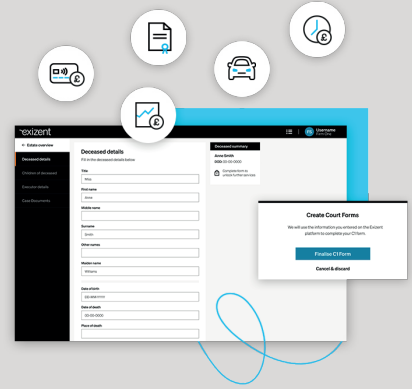
Instantly produce Estate Accounts

Exizent will also automatically create, update and reproduce Estate Accounts at any stage of the administration process. Like our IHT and Court Forms, these are updated automatically in real time when any changes are made within your case, allowing instant production at a click.

We can produce Estate Accounts in three forms, depending on your need:

- + Editable Excel Export of Estate Accounts
- + PDF Export of Estate Accounts
- + PDF Schedule of Assets & Liabilities

Having accurate accounts produced and re-produced in seconds drastically cuts down the time spent on tiresome calculations and data entry as well as risk of error. What's more, designed based on STEP standards, you can provide your clients with clear, easy to understand estate accounts that aid understanding and reduce further client queries.



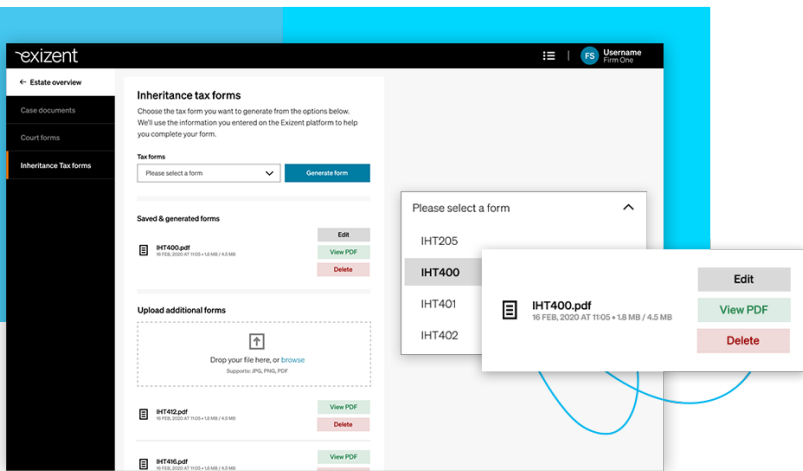
Our vision

We see a better way of working.

We're working with banks, share registrars, and other institutions to build standardised requests and responses. Government bodies and their services are digitising, and we're ready to build integrations for simplified electronic sharing of information and data.

Whilst we drive industry change, immediate improvements can also be made. It's possible to start reducing manual effort spent on data entry, re-keying information, and other administrative tasks.

Performing skilled work is easier with specialist tools. When you're working quicker, more efficiently, and with reduced risks, it's a better experience for everyone.



Correspondence made easy

Generate professional letters in seconds using templates or build them from scratch. Dynamic fields pull case information and financial institution details directly from the Estatesearch Group Institution Bereavement Address Database, giving you accuracy, consistency and flexibility every time.

Integrate. Collaborate. Simplify.

Our software is accessible securely from anywhere enabling collaboration, aiding consistency and supporting business continuity. It is used standalone by many companies, but it can also connect seamlessly with the other software that you rely on, allowing you to streamline processes and avoid re-keying or duplication of effort. Exizent fits into your existing tech stack, making estate administration smoother than ever.

Simplistic efficiency

Easily create and manage all your cases in one place, assigning team members to work together with greater clarity and efficiency. Access our secure, cloud-based platform from anywhere, allowing you to progress cases, manage data and users, and collaborate effortlessly. With its intuitive, easy-to-navigate interface, our platform integrates smoothly into your existing processes, ensuring a seamless transition for your team.

Why choose Exizent?

We're built for all legal services organisations, regardless of size and set up – and have pricing plans for small teams up to large enterprises.

That's why hundreds of law firms across the UK are choosing to switch to Exizent to support and speed up their bereavement processes at affordable, scalable prices.

When you choose Exizent, you're choosing a provider who is driven by its purpose of making the bereavement experience better for everyone, empathetic to the struggles experienced by all stakeholders, and progressive – looking to change the status quo of how bereavement is handled for the better.

What's more, we're:

+ Supported by leading technology partners:

Ascent, AWS, Experian, Sapphire, Snyk

+ Working with industry partners including:

FNZ, Law Society of Scotland, FinTech Scotland, Arken, Scottish Enterprise, SFE, ActionStep, Clio, LawWare, Lawnet

+ An approved supplier of the Law Society of Scotland and top ranked firm within Chambers LawTech 2024 Guide

+ ISO 27001 Certified



Next Steps

We're committed to improving the bereavement process, which starts with executry teams having the right tools in place. Contact us with your questions and feedback

✉ Talk to us about features and pricing: sales@legal.exizent.com

🏠 Or reach us online: Exizent.com
linkedin.com/exizent

📞 See it in action: [book a demo today](#)

