

## LPA, IHT400 & COP Workflows

Fast, accurate, specialist workflows that remove repetition, reduce errors and give your private client teams a smoother way to manage complex matters.

These workflow bundles **link all related forms**, **auto-populate shared data**, and **automate calculations**. Meaning your teams complete demanding matters with confidence and speed.

FormEvo **plugs into your existing systems** with ease. Because the data fields already follow **standard legal naming**, connecting it is **far quicker and simpler** than with legacy on-premise tools.

### Included across all bundles:

- ✔ Auto-population across all linked forms and schedules
- ✔ Locked totals (with override option) for added accuracy
- ✔ Batch printing of all forms in a bundle
- ✔ Automated calculations for assets, tax and supporting figures
- ✔ Templates for common matter types
- ✔ Navigation panel for fast access across each matter



“FormEvo workflows provides risk management at every stage of the process – for example, when ensuring benefactor capacity. That means focusing on the clients and their circumstances, not just the forms.”

## Why Firms Use FormEvo Workflows

### Cut hours of admin

All connected forms and schedules share data automatically, eliminating repeated entry across multi-form matters.

### Reduce risk at every stage

Auto-calculations, locked totals, and structured workflows help prevent errors and improve accuracy for probate, LPA and COP applications.

### Work the way fee-earners work

Multiple forms open at once, batch printing, templates and guided navigation keep teams moving quickly and consistently.

### Easy to adopt, simple to integrate

Workflows can integrate with CMS and DMS systems using common field naming conventions, resulting in a solution for your firm that is much easier than legacy on-premise systems.

# Workflows that give more than speed. They deliver confidence.

## IHT400 Workflow

Produce full HMRC Inheritance Tax accounts more quickly and with fewer errors.

- All IHT400 forms and schedules linked into one workflow
- Includes IHTC Scottish forms
- Forms can be selected individually or as a complete pack
- Full cloud integration – no installation required

## LPA Workflow

Remove repetitive entry, improve accuracy, and speed up LPA preparation.

- Designed for multiple clients, multiple LPAs and alternatives
- Automatic population of supplemental forms after initial data entry
- Automated calculations for accuracy and speed

## CoP Workflow

Streamline complex Court of Protection matters with one connected workflow.

- Pre-populates names, addresses and details across up to 14 COP forms
- Supports all required parties (e.g., applicants, attorneys, witnesses, trustees, donor)
- 'Copy' buttons to duplicate key information quickly
- Auto-populated bundles reduce completion time by up to 80%
- Share individual forms with clients (view-only or editable)
- Built-in reminders, bookmarks and completion tracking
- Auto-create COP4 forms for each Applicant and COP15PADep forms with suggested text

# Take a closer look at how FormEvo keeps forms accurate

Request a demo or a sales quotation

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