FormEvo®
Legal Forms Evolved

Fast Forms. Fair Pricing. FormEvo

Workflows for Lasting Powers of Attorney (LPA), Inheritance Tax Accounts (IHT400) and Court of Protection (CoP) matters

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

A Law Society Licensed Provider
The Law Society

CYBER ESSENTIALS PLUS

"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.

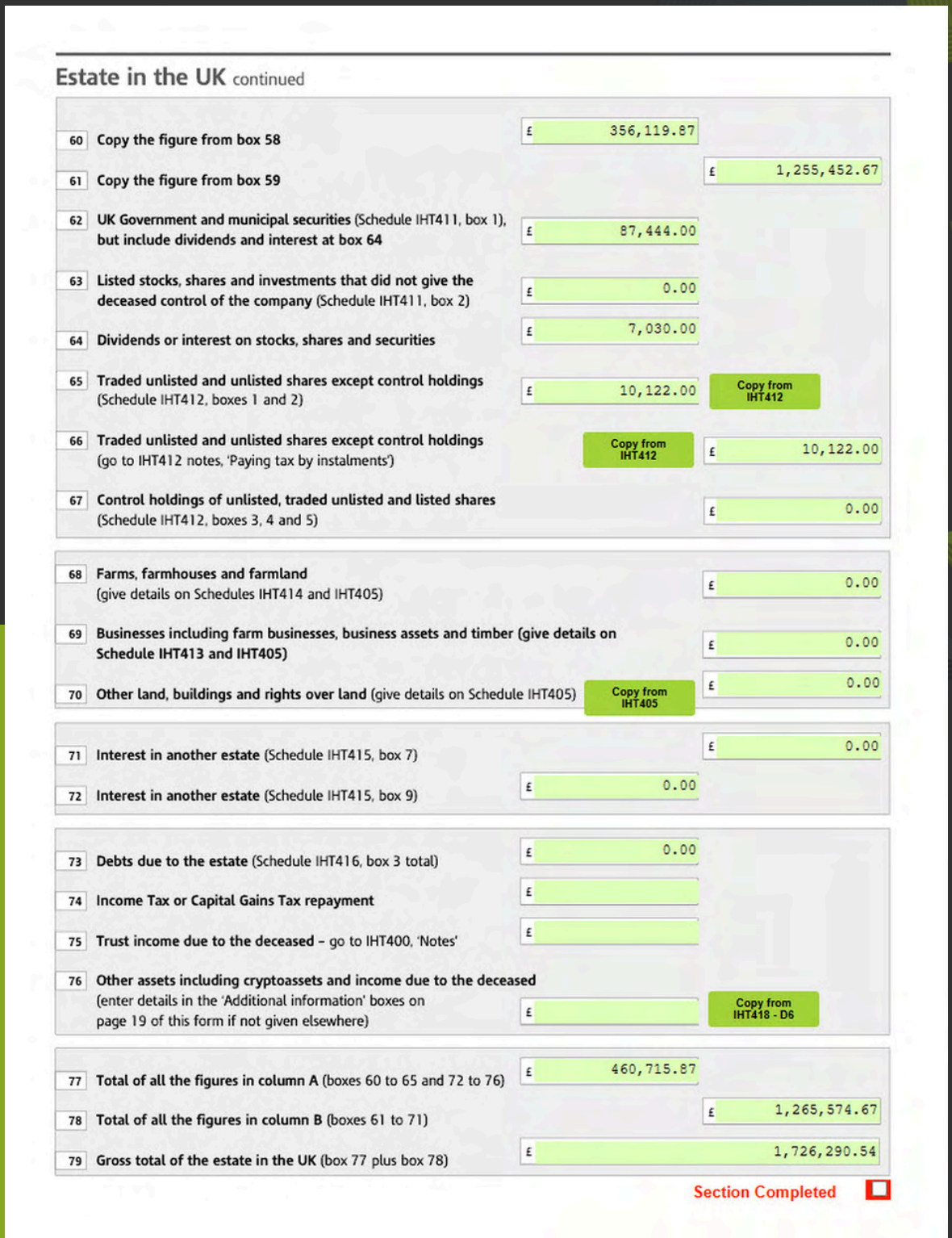
Easy to adopt, simple to integrate

Workflows can integrate with your Case Management System (CMS) and Document Management System (DMS) using common field naming conventions, making implementation far simpler than with legacy on-premise systems.

Inheritance Tax Accounts (IHT400) Workflow

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

- Auto-create a complete IHT400, with schedules automatically populated from the main IHT400, linked and can be combined into a single file for HM Revenue & Customs.
- IHT400 workflow consists of the main IHT400 form, alongside the IHT400 Calculation form and IHT401-436 schedules. Scottish 'C' forms also included.
- Forms can be selected individually or as a complete pack



Estate in the UK continued

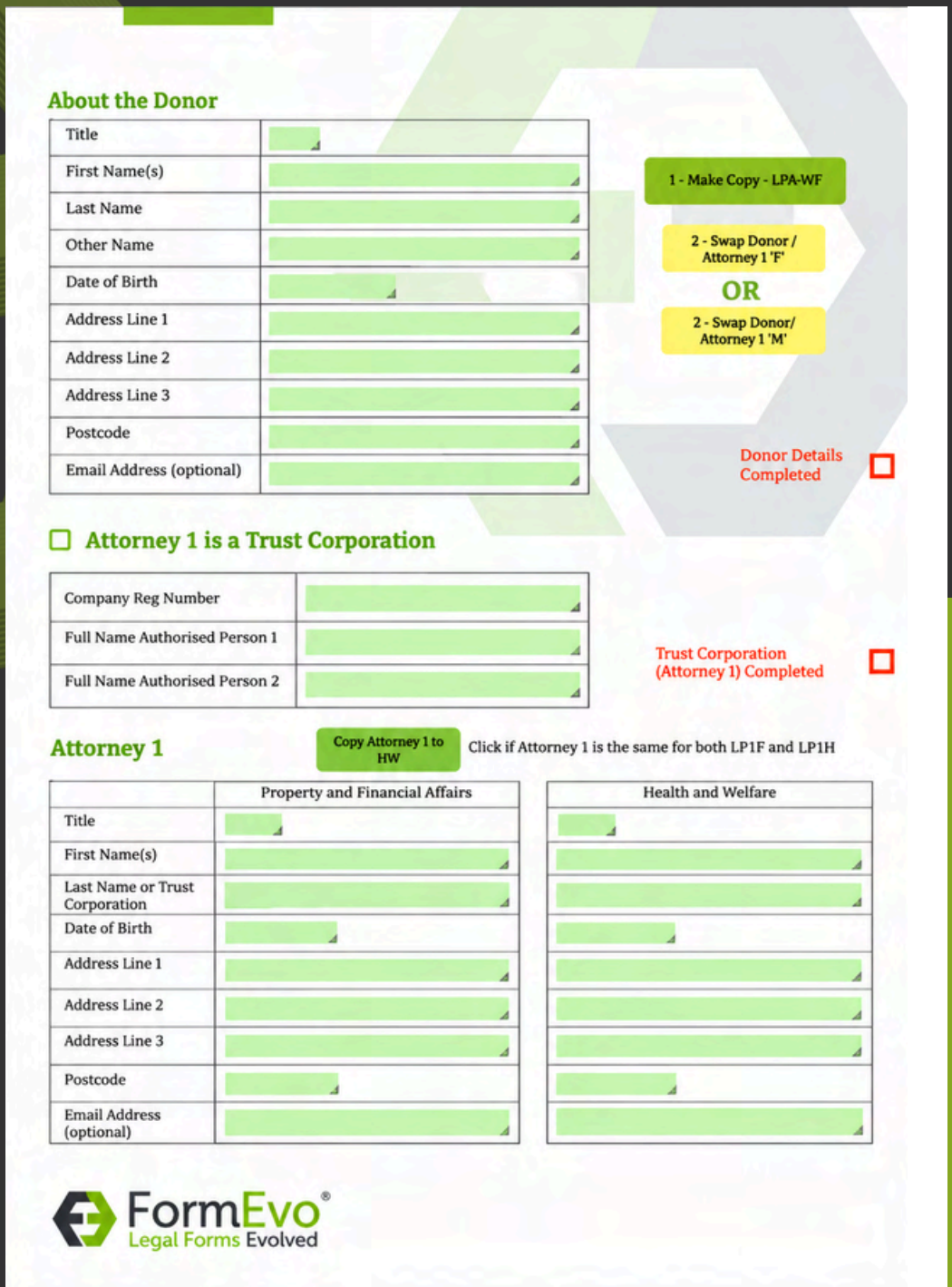
60	**Copy the figure from box 58**	£ 356,119.87		
61	**Copy the figure from box 59**		£ 1,255,452.67	
62	**UK Government and municipal securities** (Schedule IHT411, box 1), **but include dividends and interest at box 64**	£ 87,444.00		
63	**Listed stocks, shares and investments that did not give the deceased control of the company** (Schedule IHT411, box 2)	£ 0.00		
64	**Dividends or interest on stocks, shares and securities**	£ 7,030.00		
65	**Traded unlisted and unlisted shares except control holdings** (Schedule IHT412, boxes 1 and 2)	£ 10,122.00	Copy from IHT412	
66	**Traded unlisted and unlisted shares except control holdings** (go to IHT412 notes, 'Paying tax by instalments')	Copy from IHT412	£ 10,122.00	
67	**Control holdings of unlisted, traded unlisted and listed shares** (Schedule IHT412, boxes 3, 4 and 5)		£ 0.00	
68	**Farms, farmhouses and farmland** (give details on Schedules IHT414 and IHT405)		£ 0.00	
69	**Businesses including farm businesses, business assets and timber (give details on Schedule IHT413 and IHT405)**		£ 0.00	
70	**Other land, buildings and rights over land** (give details on Schedule IHT405)	Copy from IHT405	£ 0.00	
71	**Interest in another estate** (Schedule IHT415, box 7)		£ 0.00	
72	**Interest in another estate** (Schedule IHT415, box 9)	£ 0.00		
73	**Debts due to the estate** (Schedule IHT416, box 3 total)	£ 0.00		
74	**Income Tax or Capital Gains Tax repayment**	£		
75	**Trust income due to the deceased** – go to IHT400, 'Notes'	£		
76	**Other assets including cryptoassets and income due to the deceased** (enter details in the 'Additional information' boxes on page 19 of this form if not given elsewhere)	£	Copy from IHT418 - D6	
77	**Total of all the figures in column A** (boxes 60 to 65 and 72 to 76)	£ 460,715.87		
78	**Total of all the figures in column B** (boxes 61 to 71)		£ 1,265,574.67	
79	**Gross total of the estate in the UK** (box 77 plus box 78)	£ 1,726,290.54		

Section Completed ☐

Lasting Powers of Attorney (LPA) Worflow

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

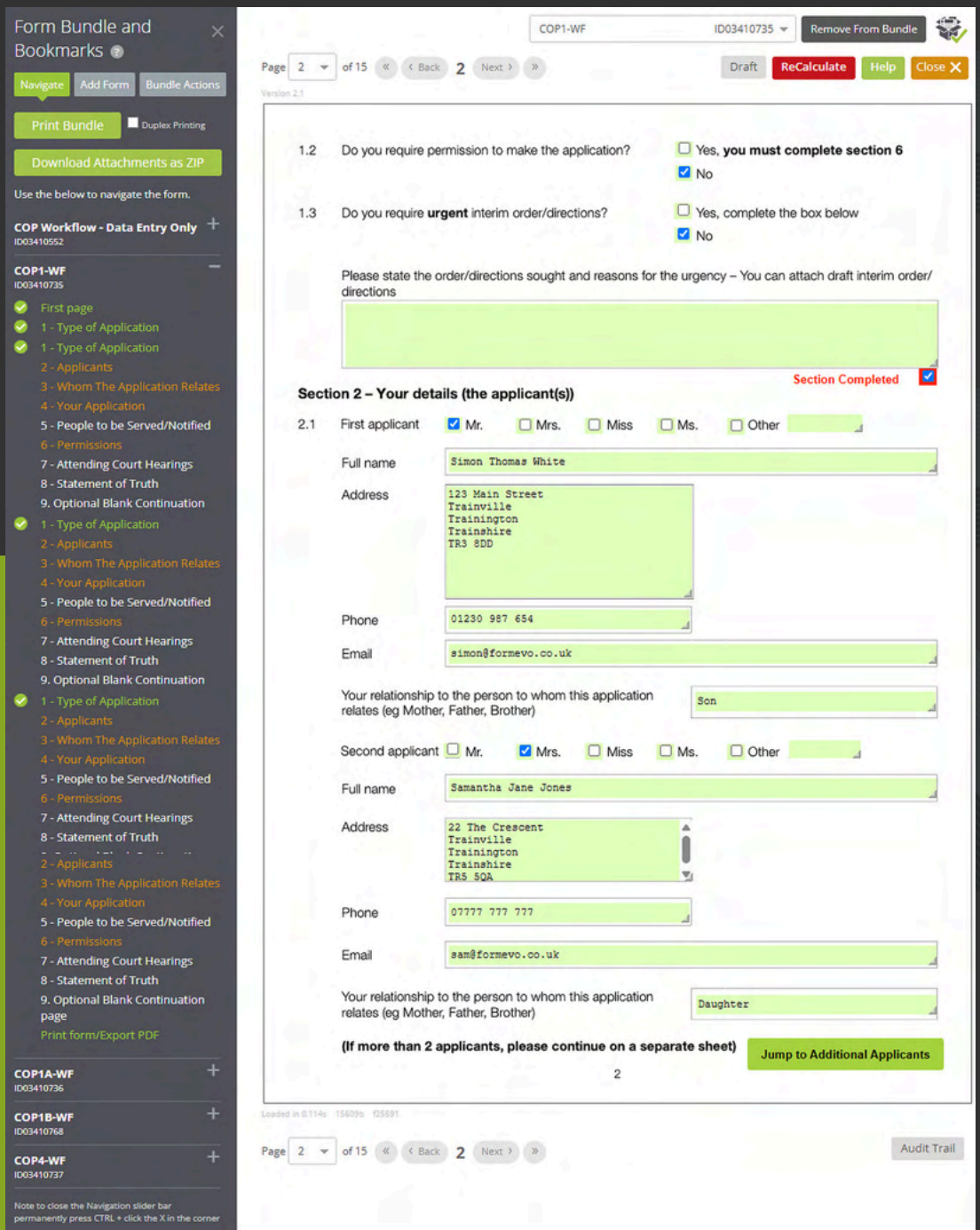
- Auto-create your LP1F/LP1H forms, with any required LPC1–LPC4 continuation forms automatically generated and attached.
- Designed for multiple clients, multiple LPAs and alternatives
- Automatic population of supplemental forms after initial data entry
- Automated calculations for accuracy and speed
- Pre-populates names, addresses and details across up to 14 CoP forms



Court of Protection (CoP) Workflow

Streamline complex Court of Protection matters with one connected workflow.

- COP premium workflow is made of all the most used COP forms including the main COP1 Application form, COP1A-1F, COP3, COP4, COP5, COP9, COP12, COP14, COP15, COP20A-B and COP24.
- 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



FormEvo®
Legal Forms Evolved

Fast Forms. Fair Pricing. FormEvo

Workflows that give more than speed
They deliver confidence

Agile browser based access – no installation required

Watch

Ross Walker, Onboarding and Training Manager at FormEvo gives a brief overview of our Premium Forms and workflows.

Tel 0330 555 9341 Email sales@formevo.co.uk Web formevo.co.uk