LegalGEN Powered by EDIOUS

O'Connell Law LLC
Planning For Your Life • Providing For Your Legacy



LegalGen provided O'Connell Law the adaptability to face the unforseen world of COVID-19

O'Connell Law Testimonials:

"Tiff immediately established an effective working relationship with my husband and me. She proactively shared her extensive knowledge and expertise regarding wills and trusts. All of this was achieved during the pandemic. Through Tiff's leadership and delegation, our wills and trust were completed to our complete satisfaction, when much of society came to a halt."

- Ann

"Tiff and her staff were incredibly helpful in assisting in creating and guiding me through the process of creating estate documents for my family. They were friendly, concise and clear throughout the entire process. I would recommend them highly."

- Lamar

Like many, O'Connell Law has felt the impact of COVID-19, and was determined to help those helping us.

This is the realization that Tiffany O'Connell, of O'Connell Law came to. Already established as a successful attorney, with a healthy clientele in Massachusetts, Tiffany wanted to help those helping us throughout COVID.

She initially set her sights on the front-line workers…the first responders, educators and essential workers who were putting their own health and safety on the line. But ran into an obstacle, how can she provide these services quickly, remotely and digitally? Through a referral via her MSD group, Tiffany partnered with **LegalGen**. **LegalGen** gave her the tools and infrastructure to create the **FrontLiner Essentials Plan**, a streamlined package including a Massachusetts Will, Power of Attorney and healthcare documents which could be created quickly and in a cost effective manner, ensuring that those "frontliners" would have their legal affairs in order.

At the same time, Tiffany found herself receiving many inquiries from people who wanted to get basic estate planning documents quickly and affordably due to the unpredictable nature of the world we now live in. These inquiries led to the **KeyThree Plan**. This plan empowered those to get critical basic documents in place extremely quickly during the pandemic.

Tiffany was able to create these plans so ***efficiently*** and ***effectively*** with **LegalGen**. The ease of use and flexability of **LegalGen** enabled Tiffany to succeed in her goal of helping others as showcased below:

LegalGEN



The *LegalGen* Advantage

"The system is absolutely brilliant. It's helpful from the client's perspective because of the ease of use and the attorney's because it reduces so much time and effort." – **Tiffany O'Connell, O'Connell Law**

LegalGen enabled O'Connell Law to succeed in their goals of helping others in a number of different ways.

First, **LegalGen** provides a secure web platform for Tiffany's clients to login to, letting them input their pertinent information, while also offering a comprehensive explanation of each detail they're entering, as if Tiffany were right next to them explaining each step.

Second, when the client hits submit, all of the information captured in the first step is ***AUTOMATICALLY*** populated into Tiffany's existing templates which include wills, POA's and other ancillary documents. These now filled out documents are in a separate folder for each client submittal.

Third, at this point all that Tiffany must do is select which documents are applicable to her client and arrange for signatures.

LegalGen has turned this complicated and time consuming process into a very efficient, seamless and cost effective process.

The **LegalGen** process has delivered up to a **60% reduction** on time spent preparing estate planning documents which afforded Tiffany the ability to offer these services at a reduced rate for the FrontLiner and KeyThree plans. It also has the added benefit of allowing for a remote and stress free environment for the client.

Finally, it has lead to an **increased prospects & leads pipeline** for Tiffany. Not only have her plans been successful, but she has also been able to leverage the power of **LegalGen** by offering her services to the MetLife/Hyatt Plan. This has produced an additional 5+ wills per month, something that would not have been feasible without **LegalGen**.

LegalGen Solutions & Features:

- Customized landing page with registration & login options
- Integration into the customers corporate site
- Administration portal with the ability to create & auto generate new user logins
- Easy to navigate (client facing) interface to capture all of the necessary estate planning data
- Automatic document package generation with endless variations based on customers needs
- Instant communication capability with email generation & download options
- Pricing models with on-line payment options which can include discounts for full, upfront payments
- Upload/Download document management capabilities



LegalGEN

214-296-9324 xts@xedious.com
www.xedious.com/legalgen