

Estates&TrustsSource™

The Next Evolution in Legal Research – Introducing WestlawNext® Canada

Dramatically improved searching, intelligent tools, and an intuitive design are the key differentiating factors that will provide legal professionals with greater **efficiency, effectiveness and confidence** in their legal research.

Research Tools that Deliver Efficiency

From the flexible all-in-one search box and customizable interface to the search filters and visual indicators, WestlawNext Canada brings you innovative research tools so you can research in a way that's most natural and intuitive to you.

Canada's Most Advanced Legal Search Engine

WestlawNext Canada lets you simultaneously search across different content types with a single query and delivers you the best results, faster. Results are ranked by relevance and sorted by content type, so you can find what you need in minutes, not hours.

New Ways to Organize and Share Research

You can copy and paste with standard citation and annotate documents by highlighting text and adding personal notes. You can also drag and drop documents and text snippets into project folders. Then folder sharing lets you tap into previous research across department and organizational boundaries like never before. Save time with instant access to shared documents from any computer. No more reinventing the wheel.

CONVENIENT HOME PAGE ACCESS TO EVERYTHING YOU NEED

The screenshot shows the WestlawNext Canada Estates&TrustsSource homepage. The interface is organized into several sections, each highlighted with a numbered callout:

- 1 Workflow Solutions:** A central area with three main categories: Estate Planning (Build-a-Will, Fill-a-Form, Histrop, Estate Planning Precedents), Estate Administration (Checklists, Fill-a-Form, Practice Manuals), and Estate Litigation (Schnurr, Estate Litigation, Fill-a-Form).
- 2 Primary Sources:** A list of legal sources including Cases and Decisions, Statutes and Regulations, Rules, Policy Documents and Directives, and Commentary.
- 3 Commentary:** A section for Canadian Encyclopedic Digest, Texts and Annotations, and Articles and Newsletters.
- 4 Forms and Precedents:** A section for Estates and Trusts Filable Forms, Ontario Estates and Trusts Precedents, and Ontario Estates and Trusts Statutory Forms.
- 5 Finding Tools:** A section for finding tools not in the main search.
- 6 Global Search Box:** A search bar at the top of the page.
- 7 Current Awareness:** A section for WeirFoulds Estates & Trusts Newsletter, Latest Supreme Court of Canada Cases, and Latest CRA Publications.
- 8 Tools & Resources:** A section for Build-a-Will, Legal Memoranda, Carswell's eReference Library, and Taxnet Pro.
- 9 About:** A section for What's in Estates&TrustsSource and Estates&TrustsSource Currency Notes.

- 1 Workflow Solutions** provides quick points of access to the material estates and trusts practitioners use most often and is conveniently divided into Estate Planning, Estate Administration and Estate Litigation.
- 2 Primary Sources** provides easy access to Cases and Decisions, Statutes and Regulations, Rules and CRA policy documents.
- 3 Commentary** provides direct access to some of Carswell's most highly regarded texts such as *Waters' Law of Trusts and Widdifield on Executors and Trustees*, as well as regional practice manuals and the CBA concordances. Subscribers can also access the CEDs relating to estates and trusts and articles and newsletters.
- 4 Forms and Precedents** provides a direct link to statutory forms and authored precedents in the three practice areas.
- 5 Finding Tools** provides direct access to Canadian Abridgment Digests.
- 6 Global Search Box** allows subscribers to conduct searches across the Estates&Trusts Source materials.
- 7 Current Awareness** offers subscribers easy access to the Weirfould Estates & Trusts Newsletter, the latest SCC decisions and the latest CRA publications pertaining to estates and trusts.
- 8 Tools & Resources** allows one click access to Build-a-Will, Legal Memoranda, Carswell's eReference Library™ and to Taxnet Pro™ for subscribers of that product.
- 9 About** provides users with a link to a review of the content coverage and currency.

What's in Estates&TrustsSource™

Estates&TrustsSource has been designed to meet both the research and workflow needs of all three types of estates practitioners: planners, administrators and litigators. In addition to the content types familiar to other Source products **Estates&TrustsSource** contains key pieces of commentary, fillable authored precedents and statutory forms, documents and critical currency services as well as Build-a-Will.

DEEPER CONTENT

WestlawNext Canada goes behind the case law and the legislation, taking you deep into the law to reveal the subtleties and intricacies that will give you true insight into your case or issue.

Case Law

Comprehensive Estates & Trusts Case Law Collection of unreported and reported decisions drawn from the Carswell case law database with the Estates & Trusts, Civil Practice, Tax and Family General headings and includes expert selection of important cases and articles and annotations from the Carswell Estates and Trusts Reports.

The only online research service that provides access to Actual court documents* from leading Canadian estate litigation actions including motions, pleadings, and facts. The Estates & Trusts court document collection is derived from the Estates and Trusts Reports (ETR), and covers the most significant cases in the practice area from 1995 on.

Supreme Court of Canada Cases

Latest SCC cases bring all SCC decisions to your attention, not just estates and trusts related ones.

Case Citor – KeyCite® Canada for cases covers the direct appellate history of Canadian cases plus treatments for any case, whether foreign or Canadian, discussed by a Canadian court or tribunal, or a secondary source on WestlawNext Canada.

EXCLUSIVE Quantum Services* – Why spend hours distilling a quantum? Litigator tells you in a matter of minutes what a claim is worth.

- **Dependants' Relief Quantum** – 30 years of decisions where the courts have determined whether a dependant was adequately provided for out of the estate

Legislation

All Legislation, including complete estates regulation coverage, for all common law provinces (i.e. all except Quebec).

Canadian Bar Association (CBA) National Concordance relating to wills, estate planning and the administration of estates.

Legislative Citators – KeyCite Canada is Canada's only complete legislative citator. It is the only statute citator with true historical depth, and the only rules citator and regulations citator in Canada. It's now possible to KeyCite all types of legislation – statutes, rules, and regulations.

INTELLIGENT FINDING TOOLS

Only WestlawNext Canada combines the advantages of authoritative editorially-created search tools and state-of-the-art search technology, ensuring that you always find exactly what you need – using fewer steps to get better results faster.

Workflow Solutions

Access the content you use most often Whether you do estate planning, administration or litigation. The Estate Planning solution lets you search Histrop, access fillable estate planning forms and precedents and link to Build-a-Will which allows subscribers to create customized wills. The Administration solution takes you to practise manuals, checklists and fillable forms. And the litigation solution takes you to Schnurr's Estate Litigation and fillable court forms.

Authoritative

The Canadian Abridgment – a comprehensive collection of over 750,000 digests of Canadian case law that is organized by legal issue according to a single taxonomy exclusive to Carswell. Covers virtually every case reported in Canada since 1803.

The Canadian Encyclopedic Digest – selected CED titles relevant to estates and trusts practitioners that provide a concise summary of the law, leading cases and applicable statutes will serve as a useful starting point for research in an area of law that may be unfamiliar to you or as a quick refresher.

Authored Treatises by Canada's foremost Estates and Trusts law experts to ensure authoritative and reliable research is at your desktop – fully integrated with links to both case law and legislation. Exclusive to Estates&TrustsSource:

- **Waters' Law of Trusts in Canada, 3rd Edition** (Waters et al.)
- **Widdifield on Executors and Trustees** (Therault, ed.)
- **Estate Planning Precedents: A Solicitor's Manual** (Histrop)
- **Estate Litigation, 2nd Edition** (Schnurr)
- **Estate Planning Handbook, 3rd Edition** (Allen and Quinlan)
- **Estate Administration Manuals for Jurisdiction-Specific Guidance** (practical step-by-step estate administration guidance; interactive checklists; fillable authored forms, documents and correspondence)
 - Armstrong's, **Ontario Estate Administration Manual** with provincial equivalents – only on Estates&TrustsSource – available for Alberta (Koski), British Columbia (Seckel), Manitoba (Geisbrecht), Saskatchewan (Hildebrandt), Atlantic Canada (Adlington) (new edition of Howlett, Estate Matters in Atlantic Canada).

Innovative

- Natural language, terms and connectors, or templates customized by document type
- **Search-within-a-search** features a locate option for precise results
- Search or browse Table of Contents
- Link from the *Canadian Encyclopedic Digest* to the applicable Canadian Abridgment classification to find more cases related to your issue

* Available with a Litigator subscription or on a pay-per-view basis.

EFFECTIVE RESEARCH PATHWAYS

All WestlawNext Canada content is seamlessly linked so you never have to back track to find related information. You'll find everything you need in one place and we'll point out and provide links to relevant related material along the way. This logical linking ensures that you always move forward in your research, giving you the fastest route to better results.

Estates&Trusts Home Page – built to allow you to efficiently handle any estates and trusts matter whether your practice involves estate planning, estate administration and estate litigation.

- Find specific information without having to choose multiple databases or learn database codes.

Extensive workflow tools such as high-quality, high-value precedents and document-generation capability, integrated with all related resources.

Document-assembly (Build-a-Will) – create a customized will for your client based on their unique circumstances utilizing Histrop's *Estate Planning Precedents*.

Provides a CRA Publications (Selected) Archive of Interpretation Bulletins, Information Circulars, CRA Views and Advance Tax Rulings for easy access to policy documents of particular relevance to estates and trusts practitioners.

Home page access to Taxnet Pro (by subscription)

KeyCite® Canada – Case and Legislative Citator

KeyCite® Canada – Case and Legislative Citator provides a network of linking from primary law to a wealth of supporting material to help you understand the decision. When you note up a **decision** with KeyCite Canada, you see not only Canadian case law that has cited the decision you have noted up, but also:

- Foreign cases which have cited the decision
- Canadian Encyclopedic Digest entries
- Law review and journal articles
- Commentary and analysis
- Court documents
- Quantum digests
- Words & Phrases entries
- Index to Canadian Legal Literature (ICLL) entries

When you note up a **statute, regulation, or rule** with KeyCite Canada, in addition to cases that have cited the legislation, you will also see references from annotated legislation and legal memos on WestlawNext Canada.

Productivity Tools

- **KeyCite Alert** – Fully integrated into your KeyCite searching, this powerful tool takes citations research one step further by keeping you apprised, via e-mail, fax, or wireless, of developments affecting cases or legislation that matter most to you.
- **EXCLUSIVE – Fillable Forms and Precedents** – Fillable forms vital to this practice area.
 - **For Estate Planning**, Fill-A-Form provides you with fillable versions of documents based on Histrop's highly regarded *Estate Planning Precedents: A Solicitor's Manual*. Create documents such as Trusts, Deeds, Domestic Contracts, Powers of Attorney, Life Insurance Declarations and many more.
 - **For Estate Administration**, Fill-A-Form includes all the statutory and authored forms and letters that are used in the process of estate administration, including checklists, sample letters and precedents, so you can be confident nothing is missed or overlooked. Ontario materials are from the authoritative Armstrong, *Estate Administration: A Solicitor's Manual* and provincial equivalents for British Columbia, Alberta, Saskatchewan, Manitoba and Atlantic Canada are exclusively available online on Estates&TrustsSource.
 - **For Estate Litigation**, Fill-A-Form includes statutory forms for every Canadian common law jurisdiction plus sample litigation forms and precedents and commentary from Schnurr, *Estate Litigation*.

- **EXCLUSIVE to Estates&TrustsSource Build-a-Will** is a state-of-the-art application that allows you to create customized wills for clients who have simple to more complex estate situations, utilizing the precedent clauses from Histrop, *Estate Planning Precedents: A Solicitor's Manual*. Reduce the time spent drafting and researching alternate clauses by referencing this intuitive application and gain efficiencies in preparing high-quality, client ready wills.

Currency Tools

- **WestClip** allows you to monitor legal developments that could affect you, your organization and your clients. Clips can be delivered to your e-mail box, wireless device, printer or fax machine.
- **SCC bulletin boards** are available from the home page and updated daily.
- **CRA Policy Documents** – New and amended CRA Interpretation Bulletins, Information Circulars and other CRA publications, as issued, selected for relevance to estates and trusts practice.
- **Legal Memoranda** – available through a subscription to Litigator or pay-per-view.
- **Carswell's eReference Library®** – convenient link for those with subscriptions to specific online products in this virtual library.
- **Newsletters** – Stay current on the most recent developments and consult with pre-eminent authorities in the field; *WeirFoulds Estates&Trusts Newsletter* is written by expert Lori Duffy, partner with WeirFoulds LLP.

Superior Support

Training Options

To ensure our customers are fully trained on how to use and maximize the content and functionality on WestlawNext Canada we offer a variety of complimentary training options that can be customized to meet customer needs, including training sessions for groups or individuals; in hands-on computer labs, board room settings or Webinars. Pre-recorded tutorials and downloadable user guides are also available on our website.

Research Support

We offer free, live telephone support 24/7 access to assist you with your research.

For more information, call 1-866-609-5811 or visit www.westlawnextcanada.com

Advantages Over Other Research Services

	WestlawNext [®] CANADA	Other Services
Ease of Use	Customizable Display Clear, intuitive interface leverages the best of modern web design and lets you customize your home page with your most frequently used content for easy access.	Other services have interfaces that are outdated and out of step with expectations of new users. Nothing compares to the customization on WLNC.
	Visual Indicators Visual indicators help you keep track of work you have already done.	No other service has anything comparable to WLNC's visual indicators.
Comprehensive Legal Content	Primary Law, Analytical, Materials, Legislation Materials Unparalleled breadth and depth of primary law, analytical materials and finding tools. Carswell's collection further enhanced by Canada Law Book collections, including authoritative case reports, key tribunal materials and market-leading treatises and annotations.	No other service can match our scope and historical depth of coverage.
	Search Single search box on home page lets you choose how you want to search; plain language, Boolean, find a particular document, note up a particular document, or simultaneously search across all document types.	Other services are limited to searching by database or content type, and require users to choose separate boxes for Boolean terms, plain language, or to find a particular document.
Dramatically Improved Search Environment	Sort and Filter Results Lets you search broadly across all content and then sort by content type such as cases, statutes, and more. You can also narrow your list results by any applicable field: jurisdiction, topic, judge, law firm, and more.	No other service has this level of filtering capability.
	Plain Language Search Market-leading plain language search engine, with results ranked by relevancy, has been newly enriched to help even novice users find what they need.	Other services do not offer plain language searching capability or the option is limited.
	Unique Editorial Tools Primary law documents integrate with related information via editorially created links, ensuring that you find what you need quickly, without missing anything: These links are powered by Carswell's market-leading finding tools: <ul style="list-style-type: none"> • Canadian Encyclopedic Digest • Canadian Abridgment classification and case digests • KeyCite Canada (case, statute, regulation and rule citators) • Words and Phrases • Index to Canadian Legal Literature 	Other services have tried to create equivalent finding tools, but their services are lacking in terms of historical depth, scope of content, and integration with other content. As a result, these services have far fewer links on primary law documents to related information, making for inefficient research.
Analyze and Organize More Efficiently	Project Folders Allow you to drag-and-drop key documents and text snippets into folders organized by issue, client, or topic, so that all vital information can be kept in one place for quicker access later.	No other service offers integrated foldering for their legal research.
	Notes and Highlighting You can highlight text within a document. You can also type in your own personal research notes on a particular case for future reference, make a note to yourself to follow up on something, and overall, keep your thought process going and productively captured.	No other service offers the ability to highlight text or create research notes.
	Copy with Citation You can copy and paste text into your work product with all available citations.	No other service offers this.