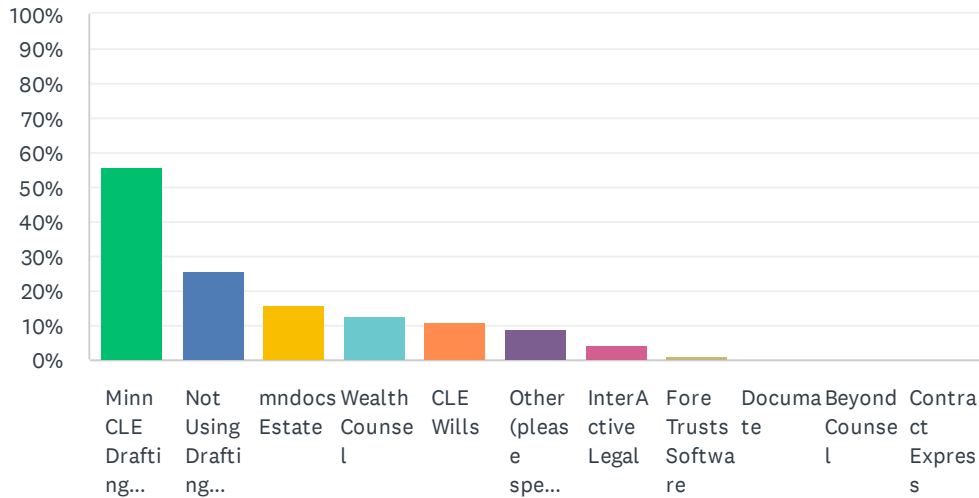


Q1 Estate Planning Drafting Software or Forms Do you use forms software to automate drafting your estate plans, or use forms from a bar association, continuing education provider, or private company?

Answered: 120 Skipped: 3



ANSWER CHOICES	RESPONSES
Minn CLE Drafting Wills and Trusts	55.83% 67
Not Using Drafting Software	25.83% 31
mndocs Estate	15.83% 19
WealthCounsel	12.50% 15
CLE Wills	10.83% 13
Other (please specify)	9.17% 11
InterActive Legal	4.17% 5
Fore Trusts Software	0.83% 1
Documate	0.00% 0
Beyond Counsel	0.00% 0
Contract Express	0.00% 0
Total Respondents: 120	

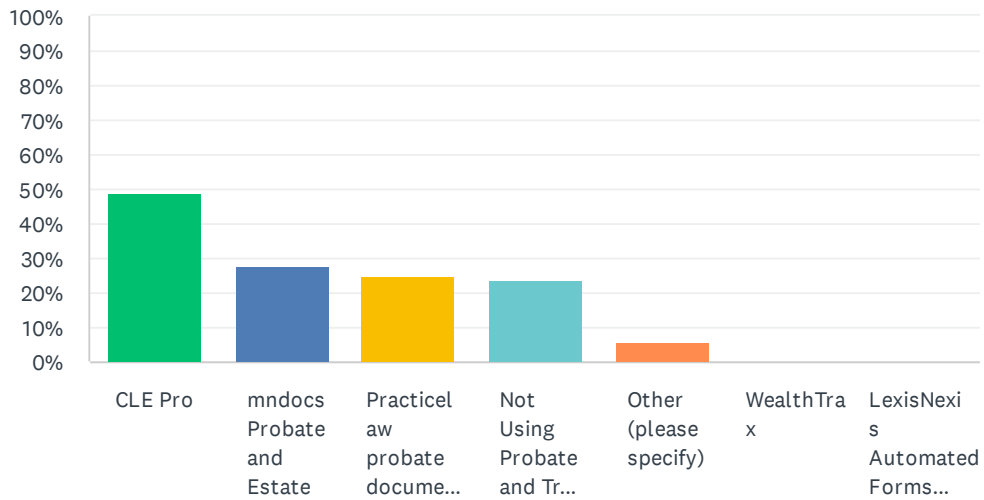
#	OTHER (PLEASE SPECIFY)	DATE
1	We use our own forms modeled after Practical Drafting forms of US Trust	4/26/2022 6:41 PM
2	xpress Docs with my own forms	4/26/2022 1:04 PM
3	HotDocs	4/26/2022 12:01 PM
4	I use my own Word docs highly modified from the Drafting Wills and Trusts template and use search/replace option in Word.	4/7/2022 7:46 AM

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5	ElderCounsel	4/5/2022 10:34 AM
6	Forms created at my firm along with a new software program.	4/4/2022 3:50 PM
7	Our firm maintains its own forms, which we assemble with Hot Docs.	4/4/2022 2:54 PM
8	ElderCounsel	4/4/2022 1:51 PM
9	Custom system of Excel & Word	4/4/2022 1:46 PM
10	templated forms in Clio	4/4/2022 1:37 PM
11	HotDocs - internal developed forms system	4/4/2022 1:24 PM

Q2 Probate and Trust Administration Software Do you use forms software to automate drafting your probate documents, or use forms from a bar association or private company?

Answered: 118 Skipped: 5

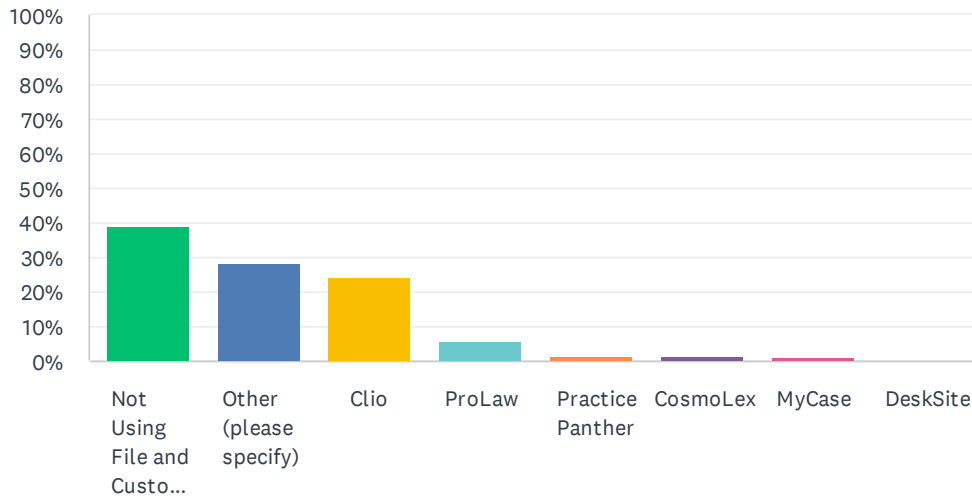


ANSWER CHOICES	RESPONSES
CLE Pro	49.15% 58
mndocs Probate and Estate	27.97% 33
Practicelaw probate documents (MSBA)	24.58% 29
Not Using Probate and Trust Software	23.73% 28
Other (please specify)	5.93% 7
WealthTrax	0.00% 0
LexisNexis Automated Forms (Matthew Bender)	0.00% 0
Total Respondents: 118	

#	OTHER (PLEASE SPECIFY)	DATE
1	Use Drafting Wills and Trust forms	4/26/2022 11:57 AM
2	hotdocs	4/26/2022 11:48 AM
3	Word	4/4/2022 3:50 PM
4	NA	4/4/2022 3:49 PM
5	HotDocs	4/4/2022 1:58 PM
6	Custom system of Excel & Word	4/4/2022 1:46 PM
7	HotDocs - internal developed system	4/4/2022 1:24 PM

Q3 Practice Management Software Do you use software to manage your client information, files, and cases?

Answered: 116 Skipped: 7



ANSWER CHOICES	RESPONSES	
Not Using File and Customer Management Software	38.79%	45
Other (please specify)	28.45%	33
Clio	24.14%	28
ProLaw	6.03%	7
Practice Panther	1.72%	2
CosmoLex	1.72%	2
MyCase	0.86%	1
DeskSite	0.00%	0
Total Respondents: 116		

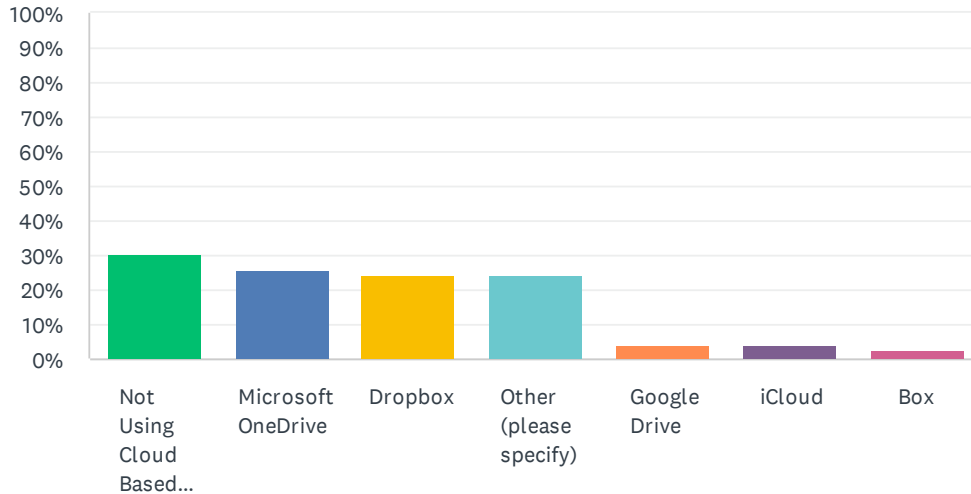
#	OTHER (PLEASE SPECIFY)	DATE
1	created my own	4/27/2022 9:18 PM
2	Worldox	4/27/2022 3:29 PM
3	Practical Manager, but switching to Abacus	4/26/2022 6:41 PM
4	PracticeMaster and Netdocs	4/26/2022 3:43 PM
5	ActionStep	4/26/2022 3:42 PM
6	actionstep	4/26/2022 1:04 PM
7	PC Law	4/26/2022 12:34 PM
8	iManage is our document management system	4/26/2022 12:03 PM
9	Amicus Attorney	4/26/2022 12:02 PM

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10	image and Practice Master	4/26/2022 11:46 AM
11	Not sure what it is call, but I think "Attorney Information Manager."	4/26/2022 11:41 AM
12	ActionStep	4/26/2022 11:39 AM
13	We are using Outlook -- we put the file number assigned to a particular matter in the notes section of all parties on a file so that when we search that file number, all those contacts appear. And we have a listing of all files for a particular client. It works well.	4/7/2022 7:46 AM
14	Practice Master and Worldox	4/5/2022 1:49 PM
15	I Manage	4/5/2022 10:57 AM
16	Lawcus	4/5/2022 10:34 AM
17	PCLaw	4/5/2022 10:19 AM
18	PC Law	4/5/2022 8:12 AM
19	ActionStep	4/4/2022 7:37 PM
20	Tabs3/Practicemaster	4/4/2022 6:04 PM
21	iManage	4/4/2022 3:40 PM
22	TimeMatters by LexisNexis	4/4/2022 3:20 PM
23	ActionStep	4/4/2022 3:14 PM
24	Our firm uses a document management system called Net Documents.	4/4/2022 2:54 PM
25	Practice Manager	4/4/2022 2:52 PM
26	Rocket Matter	4/4/2022 2:03 PM
27	In house at firm	4/4/2022 1:58 PM
28	Adarant	4/4/2022 1:44 PM
29	ActionStep	4/4/2022 1:28 PM
30	Internal System	4/4/2022 1:24 PM
31	compulaw	4/4/2022 1:23 PM
32	Salesforce	4/4/2022 1:22 PM
33	Just Quickbooks!	4/4/2022 1:21 PM

Q4 Do you use an online/cloud based storage solution to share files between members of your firm or with your clients?

Answered: 112 Skipped: 11



ANSWER CHOICES	RESPONSES	
Not Using Cloud Based Storage	30.36%	34
Microsoft OneDrive	25.89%	29
Dropbox	24.11%	27
Other (please specify)	24.11%	27
Google Drive	4.46%	5
iCloud	4.46%	5
Box	2.68%	3
Total Respondents: 112		

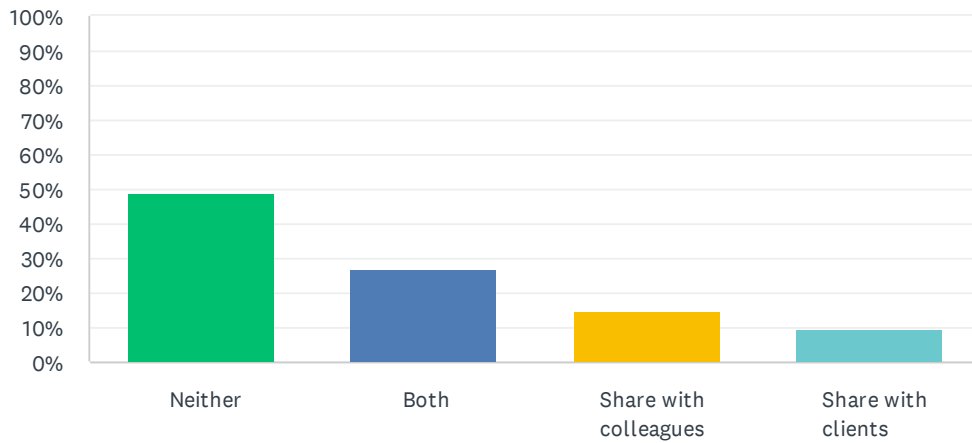
#	OTHER (PLEASE SPECIFY)	DATE
1	we use NetDrive2	4/28/2022 2:01 PM
2	Netdocs	4/26/2022 3:44 PM
3	Citrix ShareFile	4/26/2022 1:54 PM
4	Myfirmfiles	4/26/2022 1:54 PM
5	NetDocs	4/26/2022 12:34 PM
6	iManage	4/26/2022 12:04 PM
7	customized	4/26/2022 11:48 AM
8	Citrix Sharefile	4/26/2022 11:42 AM
9	ActionStep	4/26/2022 11:40 AM
10	NetDrive	4/12/2022 2:45 PM

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11	Clio	4/5/2022 9:23 AM
12	MyCase	4/4/2022 8:30 PM
13	Carbonite	4/4/2022 7:36 PM
14	Cosmolex client portal	4/4/2022 6:17 PM
15	Citrix Files	4/4/2022 6:04 PM
16	Clio Client Connect	4/4/2022 5:41 PM
17	Through our IT provider.	4/4/2022 3:51 PM
18	iManage Share	4/4/2022 3:41 PM
19	Citrix Sharefile	4/4/2022 3:21 PM
20	ActionStep	4/4/2022 3:15 PM
21	We use a service called Mimecast.	4/4/2022 2:57 PM
22	Sharefile	4/4/2022 2:53 PM
23	Privately hosted online/cloud storage - iManage	4/4/2022 2:09 PM
24	In house through firm	4/4/2022 1:59 PM
25	Clio	4/4/2022 1:52 PM
26	Clio	4/4/2022 1:38 PM
27	Sharefile	4/4/2022 1:29 PM

Q5 Are you using cloud software to:

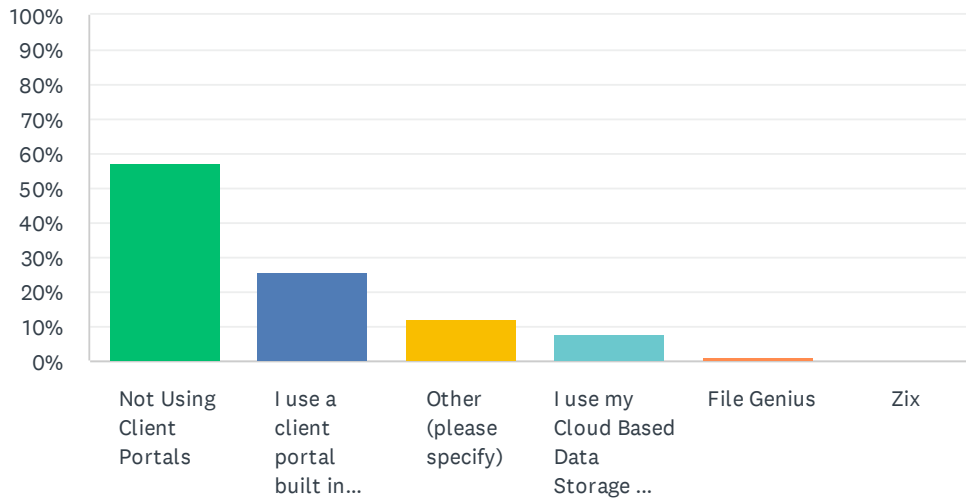
Answered: 115 Skipped: 8



ANSWER CHOICES	RESPONSES	
Neither	48.70%	56
Both	26.96%	31
Share with colleagues	14.78%	17
Share with clients	9.57%	11
TOTAL		115

Q6 Client Portals Do you use client portal software to share files, information, and to communicate with clients.

Answered: 117 Skipped: 6



ANSWER CHOICES	RESPONSES	
Not Using Client Portals	57.26%	67
I use a client portal built into my Practice Management Software	25.64%	30
Other (please specify)	11.97%	14
I use my Cloud Based Data Storage to share files	7.69%	9
File Genius	0.85%	1
Zix	0.00%	0
Total Respondents: 117		

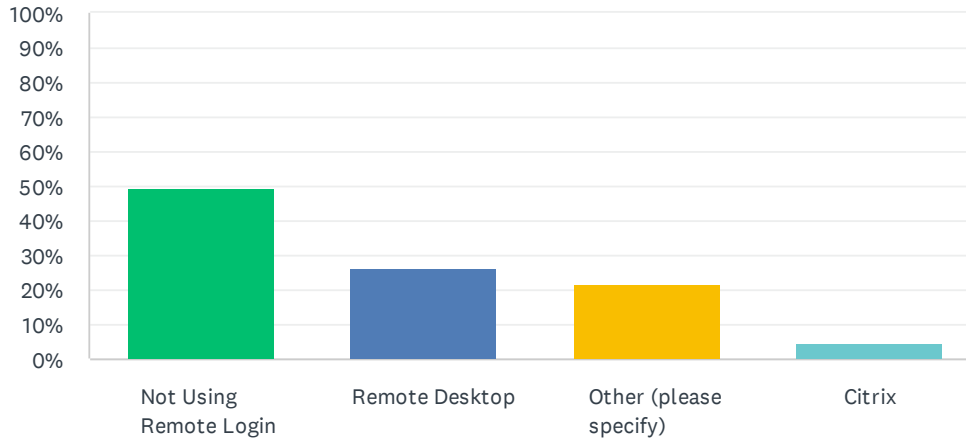
#	OTHER (PLEASE SPECIFY)	DATE
1	I have used 1Password vault at a client's request	4/27/2022 9:19 PM
2	ShareFile	4/26/2022 6:42 PM
3	Client portal is built into my case management software but haven't yet used the portal	4/26/2022 3:42 PM
4	Myfirmfiles; hopefully I'm not misunderstanding your questions 4 and 5;	4/26/2022 1:54 PM
5	I don't use the portal regularly - only for sensitive information	4/26/2022 1:47 PM
6	but looking to make this change	4/26/2022 11:48 AM
7	Citrix Sharefile	4/26/2022 11:42 AM
8	Sharefile	4/5/2022 1:51 PM
9	DecisionVault	4/5/2022 10:35 AM
10	Box.com	4/4/2022 3:41 PM
11	Our extranet service is called HighQ.	4/4/2022 2:57 PM

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12	Sharefile	4/4/2022 2:53 PM
13	Liquid file transfer	4/4/2022 1:59 PM
14	Use Financial Advisors' portals for mutual clients	4/4/2022 1:46 PM

Q7 Do you use remote login software to access your office servers or files from home or other remote locations?

Answered: 111 Skipped: 12



ANSWER CHOICES	RESPONSES
Not Using Remote Login	49.55% 55
Remote Desktop	26.13% 29
Other (please specify)	21.62% 24
Citrix	4.50% 5
Total Respondents: 111	

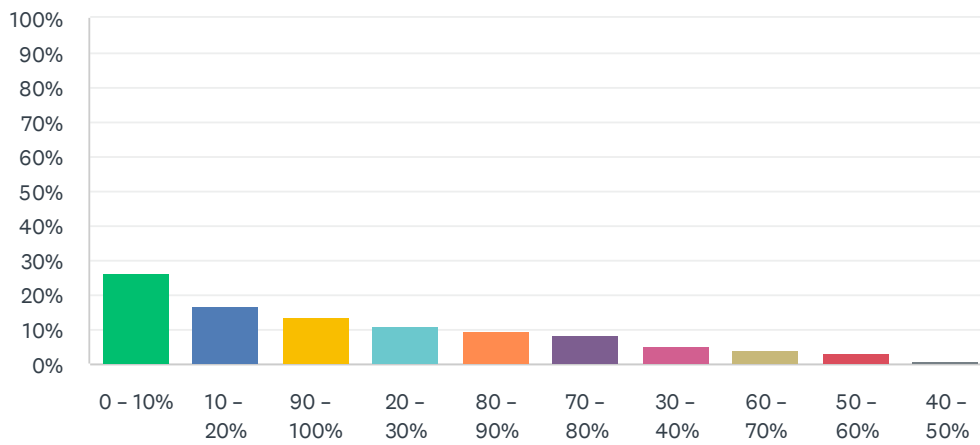
#	OTHER (PLEASE SPECIFY)	DATE
1	NetDrive2	4/28/2022 2:03 PM
2	duo	4/27/2022 3:31 PM
3	remote login software - not sure what it is called	4/26/2022 3:43 PM
4	Splashtop	4/26/2022 3:07 PM
5	Splashtop	4/26/2022 1:55 PM
6	dropbox and microsoft office 365	4/26/2022 1:49 PM
7	NetExtender	4/26/2022 12:43 PM
8	Not sure how it works, but I log in directly to our server from home without going through a separate system. It is the same experience logging in whether from home, office or elsewhere.	4/26/2022 12:06 PM
9	Sonic Wall	4/26/2022 12:04 PM
10	Not sure	4/26/2022 11:55 AM
11	SSL-VPN technology.	4/26/2022 11:49 AM
12	Sharepoint	4/26/2022 11:45 AM
13	Yes, but I'm not sure what it is called. It is some form or remote desktop.	4/26/2022 11:42 AM
14	NetDrive2	4/12/2022 2:45 PM

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15	One Drive or Sharepoint -- I don't really understand what our computer people did, and I don't use it. I live 8 minutes from my office. We had Teams -- we hated it; we found it to be very inefficient as far as navigating files -- way too many clicks to retrieve the documents we needed.	4/7/2022 7:50 AM
16	VPN	4/5/2022 9:42 AM
17	FortiClient VPN	4/5/2022 8:13 AM
18	MyCase is cloud based. I use that.	4/4/2022 8:32 PM
19	We use the Horizon client from VMWare to access a virtual desktop image.	4/4/2022 3:19 PM
20	Splashtop	4/4/2022 2:29 PM
21	VPN	4/4/2022 2:09 PM
22	In house through firm	4/4/2022 1:59 PM
23	Go To My PC	4/4/2022 1:41 PM
24	Not sure what software	4/4/2022 1:24 PM

Q8 What percentage of your time do you work remotely?

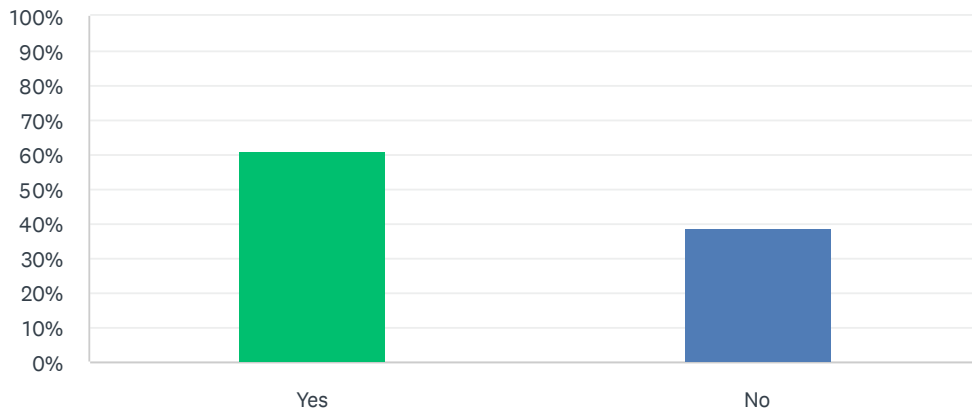
Answered: 117 Skipped: 6



ANSWER CHOICES	RESPONSES	
0 - 10%	26.50%	31
10 - 20%	17.09%	20
90 - 100%	13.68%	16
20 - 30%	11.11%	13
80 - 90%	9.40%	11
70 - 80%	8.55%	10
30 - 40%	5.13%	6
60 - 70%	4.27%	5
50 - 60%	3.42%	4
40 - 50%	0.85%	1
TOTAL		117

Q9 Has this increased since January of 2020?

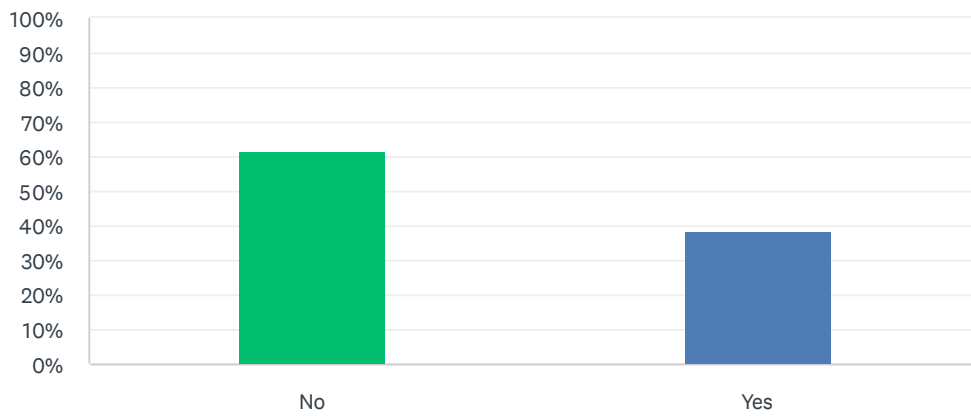
Answered: 115 Skipped: 8



ANSWER CHOICES	RESPONSES	
Yes	60.87%	70
No	39.13%	45
TOTAL		115

Q10 Do you anticipate working more in the office in 2022?

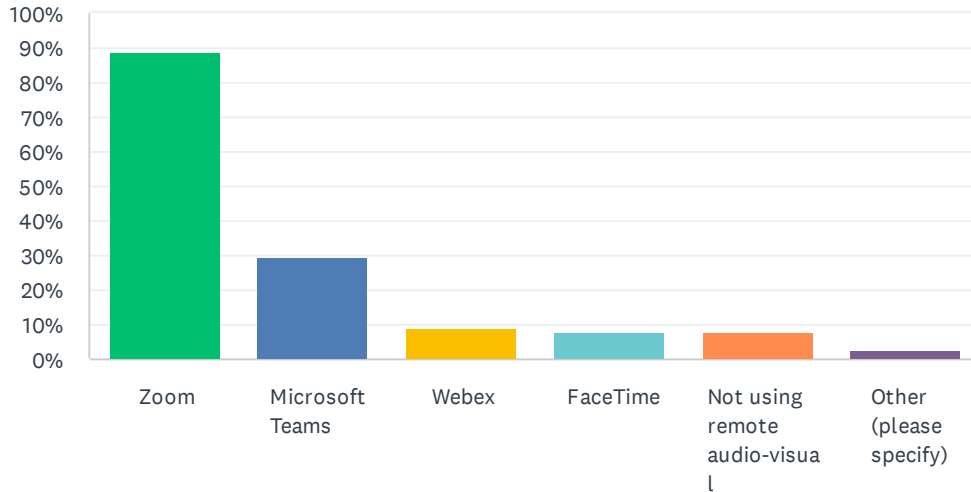
Answered: 114 Skipped: 9



ANSWER CHOICES	RESPONSES	
No	61.40%	70
Yes	38.60%	44
TOTAL		114

Q11 Do you use remote audio-visual communication with clients or colleagues?

Answered: 115 Skipped: 8

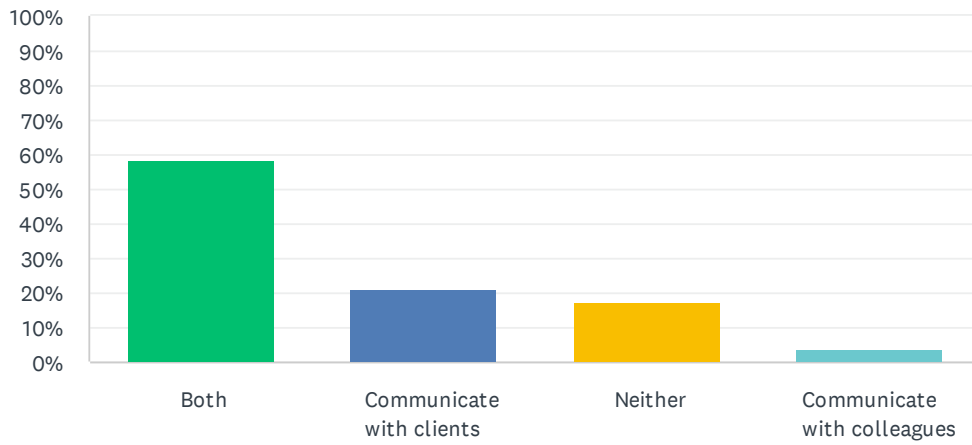


ANSWER CHOICES	RESPONSES	
Zoom	88.70%	102
Microsoft Teams	29.57%	34
Webex	8.70%	10
FaceTime	7.83%	9
Not using remote audio-visual	7.83%	9
Other (please specify)	2.61%	3
Total Respondents: 115		

#	OTHER (PLEASE SPECIFY)	DATE
1	Others initiate calls via webex, GoToMeeting etc	4/26/2022 1:57 PM
2	Ringcentral	4/26/2022 11:39 AM
3	Only when requested by clients	4/5/2022 8:14 AM

Q12 Are you using remote software to:

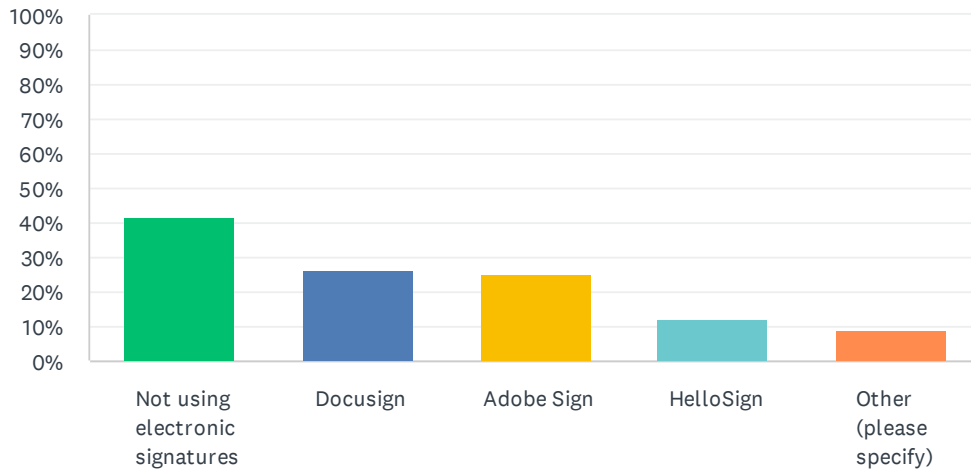
Answered: 115 Skipped: 8



ANSWER CHOICES	RESPONSES	
Both	58.26%	67
Communicate with clients	20.87%	24
Neither	17.39%	20
Communicate with colleagues	3.48%	4
TOTAL		115

Q13 Electronic Signature Tools Do you use electronic signature tools in your practice?

Answered: 115 Skipped: 8

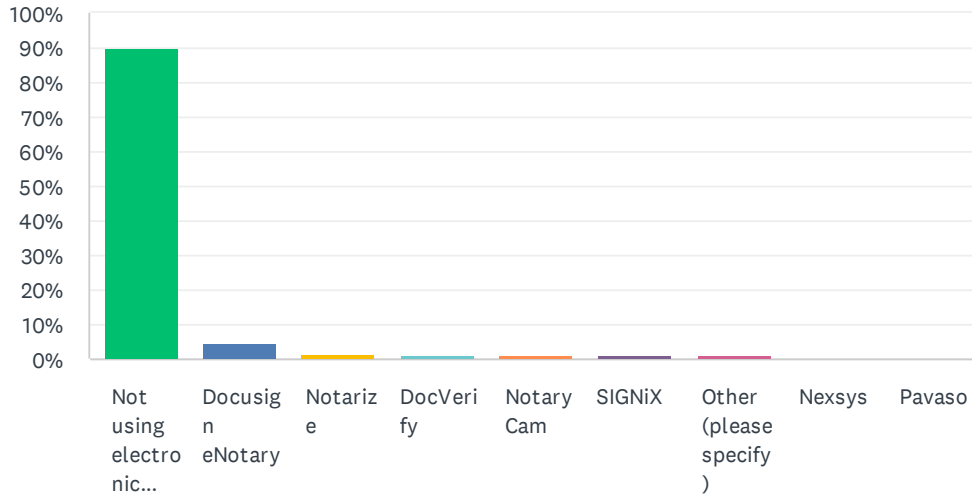


ANSWER CHOICES	RESPONSES	
Not using electronic signatures	41.74%	48
Docusign	26.09%	30
Adobe Sign	25.22%	29
HelloSign	12.17%	14
Other (please specify)	8.70%	10
Total Respondents: 115		

#	OTHER (PLEASE SPECIFY)	DATE
1	Pandadocs	4/26/2022 1:57 PM
2	Citrix RightSignature	4/26/2022 1:55 PM
3	this is included with my clio subscription	4/26/2022 1:50 PM
4	Electronic signature tool included with Clio Grow	4/26/2022 11:56 AM
5	DocVerify	4/26/2022 11:52 AM
6	paste a signature photo	4/5/2022 10:20 AM
7	Clio	4/5/2022 9:24 AM
8	Through case management program	4/5/2022 9:13 AM
9	integrated in practice management software	4/4/2022 2:48 PM
10	Sign Now	4/4/2022 1:22 PM

Q14 Do you use an e-notary service to either serve as an electronic notary, or to hire a third party to serve as a remote notary?

Answered: 111 Skipped: 12

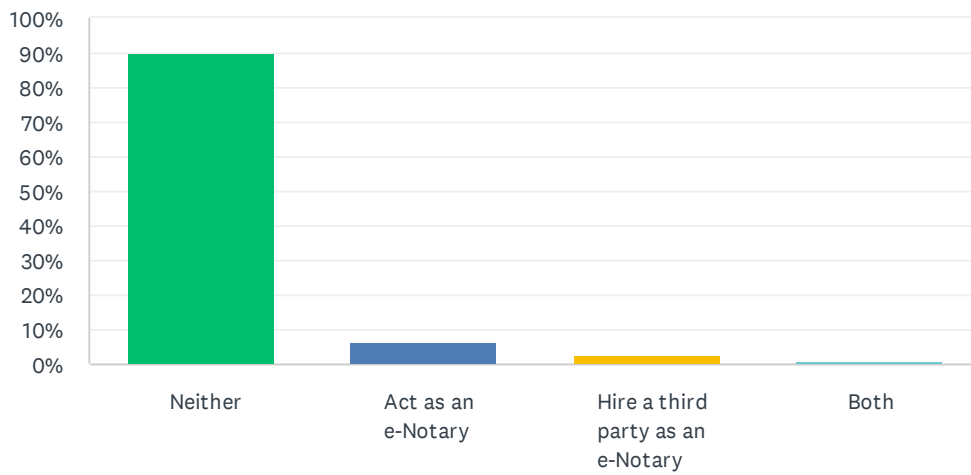


ANSWER CHOICES	RESPONSES
Not using electronic notary	90.09% 100
Docusign eNotary	4.50% 5
Notarize	1.80% 2
DocVerify	0.90% 1
Notary Cam	0.90% 1
SIGNiX	0.90% 1
Other (please specify)	0.90% 1
Nexsys	0.00% 0
Pavaso	0.00% 0
Total Respondents: 111	

#	OTHER (PLEASE SPECIFY)	DATE
1	don't know the vendor	4/26/2022 11:51 AM

Q15 Are you using remote notary software to:

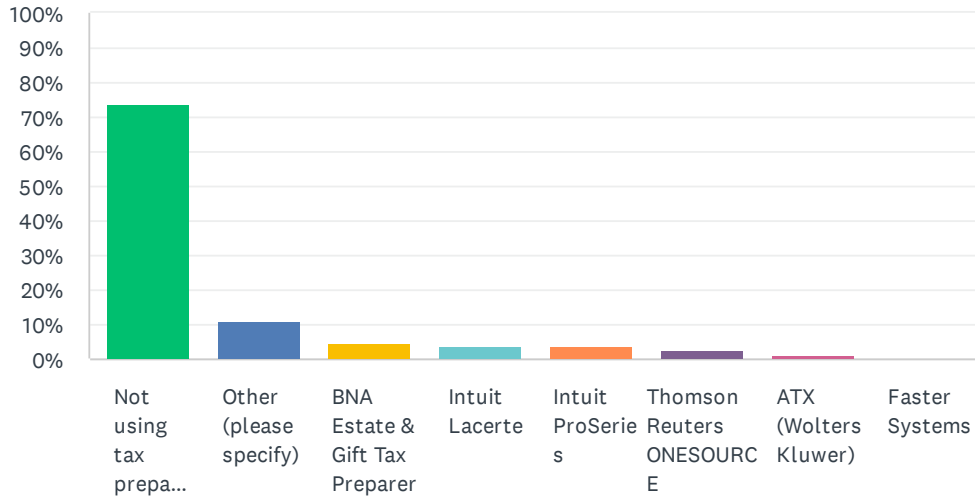
Answered: 110 Skipped: 13



ANSWER CHOICES	RESPONSES	
Neither	90.00%	99
Act as an e-Notary	6.36%	7
Hire a third party as an e-Notary	2.73%	3
Both	0.91%	1
TOTAL		110

Q16 Tax Preparation Software Do you use tax preparation software in your practice?

Answered: 110 Skipped: 13



ANSWER CHOICES	RESPONSES
Not using tax preparation software	73.64% 81
Other (please specify)	10.91% 12
BNA Estate & Gift Tax Preparer	4.55% 5
Intuit Lacerte	3.64% 4
Intuit ProSeries	3.64% 4
Thomson Reuters ONESOURCE	2.73% 3
ATX (Wolters Kluwer)	0.91% 1
Faster Systems	0.00% 0
Total Respondents: 110	

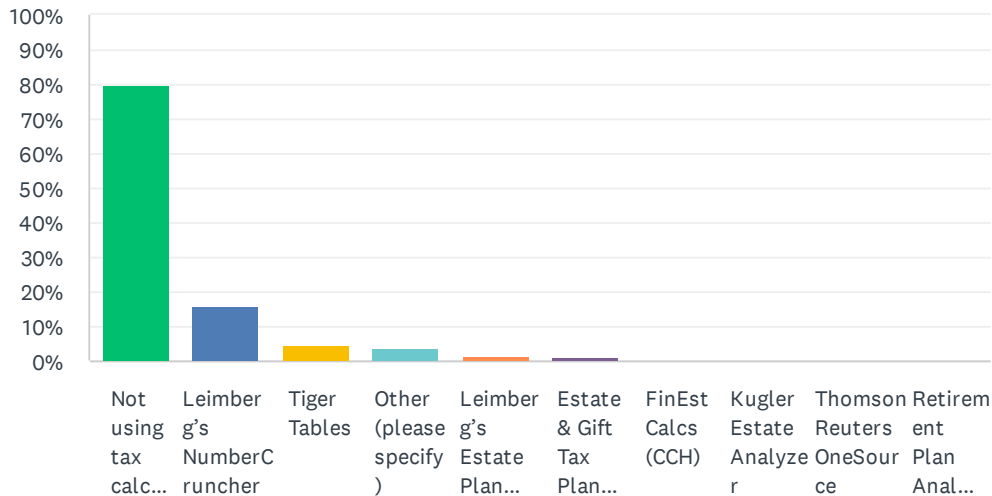
#	OTHER (PLEASE SPECIFY)	DATE
1	Turbo Tax	4/27/2022 8:04 AM
2	Ultratax	4/26/2022 3:11 PM
3	drake	4/26/2022 1:05 PM
4	CPA prepares taxes	4/26/2022 12:39 PM
5	don't know	4/26/2022 12:07 PM
6	CCH Prosystem	4/26/2022 11:51 AM
7	PCL:aw, prepares the data for the tax forms	4/5/2022 10:22 AM
8	Lackner 6-in-1	4/4/2022 3:23 PM
9	CCH Axxess (Wolters Kluwer)	4/4/2022 3:23 PM

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10	Ultratax	4/4/2022 2:31 PM
11	CCH Axxess	4/4/2022 2:11 PM
12	ProSystems	4/4/2022 1:25 PM

Q17 Tax Calculation or Modeling Software Do you use tax calculation or tax modeling software in your practice?

Answered: 109 Skipped: 14



ANSWER CHOICES	RESPONSES
Not using tax calculation or modeling software	79.82% 87
Leimberg's NumberCruncher	15.60% 17
Tiger Tables	4.59% 5
Other (please specify)	3.67% 4
Leimberg's Estate Planning QuickView	1.83% 2
Estate & Gift Tax Planner (BNA)	0.92% 1
FinEst Calcs (CCH)	0.00% 0
Kugler Estate Analyzer	0.00% 0
Thomson Reuters OneSource	0.00% 0
Retirement Plan Analyzer	0.00% 0
Total Respondents: 109	

#	OTHER (PLEASE SPECIFY)	DATE
1	Minnesota estate tax calculator	4/26/2022 12:37 PM
2	Lackner 6-in-1	4/4/2022 3:23 PM
3	I make my own Excel spreadsheets for complex tax calculations.	4/4/2022 3:23 PM
4	zCalc	4/4/2022 2:11 PM