Estate Planning
Military Veterans Online Wills Clinic

Why:
- Give back to community
- Improve Scheduling
- Increase frequency
- Improve accessibility
- Hub to other benefits (e.g. MSSA, VetLex, Rallypoint...)
- Helping vets who help others

What:
- Vet-First online wills clinic

How:
- Online Coordinated Service

Challenges:
- Blended families
- Disinheritance
- Assets
- Witnessing
- Post Change

Ad-hoc:
- Consider coordinator role
- WS Veterans BA
- NW Justice Project

Microsoft Azure Web Site

Online Wills Clinic Web Interface

Considerations:
- Privacy
- Security & Encryption
- Record Retention Policy
- Content Accessibility
- Protect Vulnerable Populations

Customer:
- Elderly requiring will update
- Young vets with family and kids requiring update

Augmentation:
- Info Boxes
- Bot Framework - Q&A
- Video Tutorials

User Account Creation

Military Veteran

Volunteers

Match

Match

Experienced Attorney

Junior Attorney

Non-Attorney

CLE Completion

Malpractice Insurance Coverage (currently 2k hours)

Vetting:
- WS Bar Check
- Estate Planning Qualifications
- Seniority (Yrs)
- Scoring from Survey

Summary of Offer:
- Pre-Planning
- What are documents (e.g. POA, Health Directive...)
- Who qualifies
- Video introduction
- Explain value for family

E.g. $500k for single person and $1m for couple

Qualify for Service – Means Tested

Yes

Elderly In-Person Request

No

External Referral. E.g. VetLex

No

Testament Questionnaire:
- Assets (w/ links to Zillow..., calculator [insurance, property tax, capital gains, state tax])
- Flag Complexities (Trust; special needs; government benefits)
- Digitally Sign and Encrypt
- Allow Spouse Sharing Data (tied with login)
- Automation with address fill-in... also standardization and logging
- Break apart topics w/ save points

Completed Questionnaire sent for Matching

Yes

Marching System:
- Find Volunteer closest to Veteran
- If Volunteer agrees, provides Bing Local public library as meeting place

Was will Completed

Yes

Feedback Survey by Volunteer and Veteran

Data Retention:
- 3 months retention and purge after
- After 3 months aggregate for metrics

Business Intelligence:
- Census and data.wa.gov
- Identify how to better serve veterans