**If your firm uses Inheritance Tax forms, and you are not using workflow software, FormEvo can help you save time and improve risk management**.

Specific workflow bundles such as the IHT400 workflow can be used to save significant time and reduce the opportunity for errors across form bundles.

All forms and schedules that are related to each other are linked through auto population. This helps busy private client lawyers to accurately, and easily, complete these complex forms using automated calculations.

## KEY FEATURES AND BENEFITS

- Work on multiple forms and schedules simultaneously

- Print all linked forms and schedules in one batch

- Set up templates for common matters to improve practice competences

- Add or remove relevant schedules for matters whilst brought forward figures auto update - delivering a smooth process

- Use a linked navigation panel to save the time it takes to find all the forms and schedules for each matter

- Automated calculations of asset values, and complex inheritance tax-due figures, provide greater accuracy and time savings for the system user

- Locked totals prevent users accidentally overtyping - but they can unlock these fields if required

"**Automatic population of supplemental forms following initial data entry, and accompanying calculations, enables accurate and quick completion of forms**"
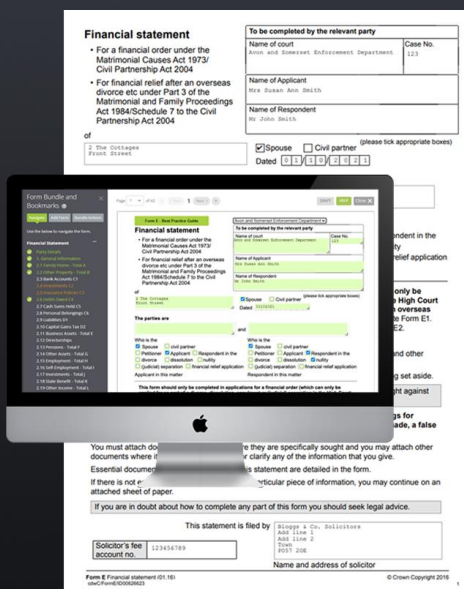
The IHT400 workflow comprises all forms related to a full HM Inheritance Tax account which is commonly known as the IHT400 forms. This allows the forms and schedules to be selected individually and linked as one file, simplifying the production of a full account for HM Revenue and Customs. This also includes IHTC Scottish forms too.

The IHT400 Workflow can be fully integrated within the cloud forms catalogue without any software installation required.

FormEvo can be integrated with many Case Management and Document management Systems and even your 'Searches' Provider. Data-Mapping is much easier than traditional on-prem' applications through the use of Common Field Naming conventions.

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.



"Some forms are combined into bundles where we can auto populate data across multiple forms and set up auto calculations that can take out up to 80% of the time to complete as non-bundled forms"

**If you'd like to know more, contact us at info@formevo.co.uk or call our Sales Director Paul on 07340 902835**