

## Case Study

**B**eneficial Legal specializes in estate planning with both attorneys and counselors, with the National Association of Family Services (NAFS) based in California. The firm fosters culture that the customer comes first and that no matter the circumstances, that they will treat the client with respect. They guarantee effective and professional representation – and their reputation and history of successful Probate and Estate Planning speaks for itself. The company believes in uncompromising ethics and they instill confidence and trust.

Celant Innovations  
330 E. Liberty St.  
Ann Arbor, MI 48014  
718.414.2413  
www.celant.com

# BENEFICIAL LEGAL

*“From beginning to end, we could literally have an estate plan boxed and ready to go within a couple of days - where it used to be a two or three-week process. Celant has made the process more efficient, effective and improved our profits dramatically.” — Steve Ramadan, Esq.*

**S**teve Ramadan, the Managing Partner, has a BS in finance and a law degree. He is a licensed attorney in multiple states and has been in private practice for 29 years. Steve spends most of his time now running the company, rather than practicing law. He says that serving the National Association of Family Services has forced the company to grow significantly. Steve provides the estate planning for its members. When the NAFS began it was doing maybe 15-20 plans per week, but now they are projected to have about 5,000 customers in the next year. Estate planning requires Steve to prepare roughly 10 documents per plan.

Prior to using Celant Innovations, the Beneficial Legal team had set up templates in Microsoft Word and Microsoft Access. So, the lawyers would fill in the fields in Access and then merge the documents in Word. Steve says that this process was manual, tedious and very time consuming. This approach was clearly not going to work to keep the business profitable as the client base grew into thousands per year.

Steve explained how he chose Celant to resolve these issues: “I learned about Celant through a colleague. When I looked at what

they did, it was a great match for precisely what we needed.”

*“To the attorneys, this is a godsend.”*

“We would do the consultation with individuals by phone and then it was pure manual effort from there. Now, at the same time the attorneys are doing the consultation, they're inputting the information directly into the system, which creates the documents. So we eliminated two steps. First, the attorneys no longer have to enter information into a form fillable document and second, we no longer have to download it to retrieve and enter it. So it's significantly streamlined the system. We save a huge amount of time there and elsewhere. I believe we are saving about 70-75% per individual client. That's a lot.”

In addition, Steve says that he is also a user of the system. “My involvement with the system is after the attorneys do the consult and enter the information. I review the input of every single client before we send them a summary. But it's very easy because I can literally check out all the information in one page.”

*Continued on page 2*

# BENEFICIAL LEGAL

***“We save a huge amount of time... I believe we are saving about 70-75% per individual client. That’s a lot.”***

“I click on the dropdown, and boom. All the information's right there. I'm just looking to see if there are any unusual requests, anything that looks out of the ordinary. It's extremely efficient and I can now review most files in a minute.”

“Celant also provided a capability where we send a text notification upon completion of review, so the clients know when they have been emailed their summary on their cell phone,” explained Steve. They can go and look for it, which speeds up the process a lot. You're not waiting for a client to check their email. Since we have a lot of older clients, they don't check it every minute like a millennial. They may check it once or twice a week or maybe even once or twice a month. But by getting a text, they know that their summary is ready to be reviewed.”

“The client knows within minutes when the summary is sent, usually by the next day. And then they can let us know by email or phone if there are any corrections. So, we make the correction and send them an updated summary. They give us the okay. We then print and ship.”

Finally, Steve adds: “It's much easier than let's say 25 years ago when I used to do an estate plan. From beginning to end, we could literally have an estate plan boxed and ready to go within a couple of days — where it used to be a two or three-week process. That is huge

progress. Celant has made the process more efficient, effective and improved our profits dramatically.”

Steve says that the Celant organization is extremely creative, responsive and understands legal and financial documentation.

***“Celant’s ingenuity has been fantastic. The level of professionalism is fantastic. We’ve just been extremely happy.”***

He adds that he is very happy to be a reference account for Celant and would easily recommend Celant for any organization dealing with multiple legal or financial documents requiring coordination.