



Lexis® Smart Forms

Save time and draft with confidence.

The Lexis® Smart Forms tool guides you through the document creation process to help you generate first drafts quickly and with confidence. By cutting down the amount of time spent manually drafting, it helps you work more efficiently, freeing up your time to do high-value legal work.

- Intelligent question-and-answer technology
- Forms and agreements drafted by practicing lawyers or our internal Lexis Practice Advisor® team
- Includes drafting notes and links to other practical guidance and resources

AVAILABLE PRACTICE AREAS

- Capital Markets and M&A
- Commercial
- Corporate and Private M&A
- Employment
- Finance
- In-House Counsel
- Intellectual Property & Technology
- Wills, Trusts & Estates

LEXIS PRACTICE ADVISOR—PRACTICAL GUIDANCE FROM 300+ CONTRIBUTING LAWYERS



Practice Notes
Professional insight for your legal matters



Precedents
With drafting notes to simplify your drafting



Checklists
Step-by-step guidance for your tasks

HOW YOU BENEFIT

Intuitive Document Building

- Stay seamlessly on one platform.
- Build a complex document by answering a set of questions instead of starting from scratch.
- Finalize your form in a familiar environment by downloading in Word or PDF.

Efficiency

- Quickly create first drafts of documents.
- Use saved answers and data to generate a variety of forms from a single questionnaire instead of manually entering information each time.
- Free up valuable time and resources to focus on high-value legal issues.

Draft with Confidence

- Begin with precedents written by lawyers that provide unsurpassed authority.
- Ensure documents are current and reflect the most recent changes in the law.
- Access legal know-how and additional explanatory content integrated from Lexis Practice Advisor.

STEP-BY-STEP GUIDANCE THROUGH THE DRAFTING PROCESS

① Select a trusted form.

The screenshot shows a search interface with a 'Narrow By' filter set to 'Corporate and Private M&A'. A search bar contains 'Enter search terms'. A 'Jurisdiction' filter is expanded, showing a list of jurisdictions with their respective counts: Federal (111), British Columbia (86), Ontario (86), Alberta (75), and Non-jurisdictional (61). A 'Select multiple' link is visible. The search results list '3. Director Consent to Act Smart Form' and '5. Director Consent to Act (CNCA)'. A 'More about Lexis Smart Forms' pop-up window is overlaid, showing a three-step process: Step 1 (Answer questions), Step 2 (Build document), and Step 3 (Download document). A note explains that Smart Forms help save time and reduce errors by using relevant content and clauses based on user input.

② Build your document.

The screenshot shows the 'Director Consent to Act' Smart Form interface. The document title is 'Director Consent to Act'. A 'Smart Form' banner indicates that users can save time and reduce errors by using an interactive questionnaire. A 'Build Your Document' button is prominent. Below the banner, a 'Summary' section is visible, showing a list of questions and answers.

③ Answer questions and save for future use.

The screenshot shows the 'Director Consent to Act in progress...' questionnaire. The 'Topic Progress...' section is expanded to show 'Corporation' as the selected topic. The 'Corporation' section includes a 'Name' field and a question: 'Is the corporation a registered charity?' with 'Yes' and 'No' radio button options. A 'Quit' button is visible. The 'Interview progress...' section shows '0 Questions Answered' and '11 Questions to Answer (4Min)'. A 'Save' button is also present.

④ Preview and download.

The screenshot shows the 'Director Consent to Act complete' document preview. It includes instructions for reviewing the document and changing answers. Below the instructions, there are two options for creating a document: 'Create a Word/DOCX document, containing: The document, Drafting notes, Interview summary' and 'Create a PDF document, containing: The document, Drafting notes, Interview summary'. Both options have 'Open' buttons. A 'DIRECTOR CONSENT TO ACT' document preview is shown at the bottom.

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