

# White Paper: The MitiRisk vs WealthCounsel

## *Modernizing the "Stateless" Legal Workflow*

### 1. Stateless Security & Zero-Data Liability

Unlike legacy cloud drafting tools that store sensitive client data in their proprietary databases, MitiRisk operates on a **Stateless Architecture**.

- **The Benefit:** MitiRisk does not permanently store the "state" of a client's file. It acts as a secure conduit, taking intake data, generating the instrument, and pushing it immediately to your firm's secure vault.
- **The "So What?":** This drastically reduces your firm's cyber-liability. If a hacker targets your drafting software, they find an empty pipe, not a treasure trove of client SSNs and asset lists.

### 2. Orchestration vs. Just Drafting

WealthCounsel (WealthDocx) is a drafting tool. Once the document is generated, the attorney is left to manually download, rename, and file it.

- **The Benefit:** MitiRisk provides **End-to-End Orchestration**. It bridges the gap between the "Pay" button and the "Archive" folder.
- **The "So What?":** It eliminates the "Administrative Leak"—the 20–30 minutes per matter spent by paralegals dragging files into NetDocs, Google Drive, or Clio.

### 3. Modular "Instrument Bundling"

Most legal software requires you to generate one document at a time (e.g., generate a Will, then generate a separate POA).

- **The Benefit:** MitiRisk allows for **Logic-Based Bundling**. Based on a single intake form, it can trigger the simultaneous generation and vaulting of a full "Estate Bundle" or "Corporate Formation Suite."

- **The "So What?":** You deliver a complete product to your client in seconds, not hours, allowing for "Same-Day Signing" ceremonies that wow clients.

#### 4. Tech-Stack Agnostic (No Vendor Lock-In)

WealthCounsel is increasingly pushing users into the **LEAP ecosystem**. If you don't use their specific practice management, the integrations become "clunky."

- **The Benefit:** MitiRisk is built to be a "Plug-and-Play" layer. Whether you use **NetDocs, Google Workspace, or Microsoft 365**, MitiRisk orchestrates directly into your existing ecosystem.
- **The "So What?":** You aren't forced to change how your entire firm runs just to get better automation. MitiRisk adapts to you.

#### 5. "Lean" Legal Documents

A common complaint about WealthCounsel is "over-drafting"—producing 80-page trusts for simple families.

- **The Benefit:** MitiRisk utilizes **Conditional Logic Gates** to ensure only necessary clauses are included.
  - **The "So What?":** Your clients get documents they can actually read and understand, which reduces the time you spend explaining 40 pages of irrelevant boilerplate.
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## Comparative Summary Table

<b>Feature</b>	<b>WealthCounsel</b>	<b>MitiRisk</b>
<b>Primary Focus</b>	Legal Content / Clauses	Workflow / Orchestration
<b>Data Storage</b>	Stateful (Stored on their Cloud)	<b>Stateless</b> (Transient/Secure)
<b>Post-Drafting</b>	Manual Download/Filing	<b>Automated Vaulting</b>
<b>Pricing</b>	High Monthly + Setup Fees	Transactional / Scale-friendly
<b>Complexity</b>	High (Steep learning curve)	Low (Automated API-first)

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# MIGRATION PATH

Transitioning from a legacy "stateful" giant like WealthCounsel to a "stateless" orchestrator like MitiRisk isn't a "rip and replace" scenario—it's an **evolution**. Most firms will use a hybrid approach during the transition to ensure zero downtime for active matters.

Here is the professional migration path for a firm moving to MitiRisk.

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## **Phase 1: The "Parallel Run" (Weeks 1–2)**

Don't turn off WealthCounsel yet. Use this phase to map your logic.

- **Audit Your Bundles:** Identify your top 3 most-used "Instrument Bundles" in WealthCounsel (e.g., the *Basic Will Package* or *LLC Formation Kit*).
- **Extract Logic, Not Code:** You don't need WealthCounsel's source code. You simply need to document the "If/Then" triggers. (e.g., "*If the client has children, include the Guardian Clause.*")
- **The MitiRisk Sandbox:** Set up your MitiRisk environment to point to a "Test" folder in your vault (Google Drive/NetDocs) to ensure the stateless handoff is working perfectly.

## **Phase 2: Building the "Stateless Master" (Weeks 3–4)**

This is where the developer work happens to recreate the legal instruments within the MitiRisk logic engine.

- **Template Mapping:** Use the "Generic Full Living Will" structure we discussed to build your master templates.
- **Data Schema Finalization:** Define the JSON payload that will drive these documents.
- **Integration Hook:** Connect MitiRisk to your intake form (Typeform, Jotform, or a custom portal) and your payment processor (Stripe/LawPay).

## Phase 3: The "Soft Launch" (Month 2)

Start routing **new, simple matters** through MitiRisk while keeping complex, legacy cases in WealthCounsel.

- **The "Clean Intake" Test:** Have new clients use the MitiRisk flow. Watch the document move from *Payment* → *Orchestration* → *Vault*.
- **Feedback Loop:** Check the generated documents against a WealthCounsel equivalent to ensure the legal "Lean-ness" meets the firm's standards.

## Phase 4: Full Cutover & Archival (Month 2+)

Once the firm is confident in the MitiRisk orchestration, you "sunset" the drafting portion of WealthCounsel.

- **Legacy Data Transfer:** Since MitiRisk is stateless, you don't "import" WealthCounsel data. Instead, ensure all past WealthCounsel PDFs are already in your permanent vault.
  - **Subscription Downsizing:** Cancel the expensive WealthCounsel drafting seat and move to a "Library Only" or "Research Only" membership if needed for legal updates.
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## The "Why" Behind This Path

Barrier	Migration Solution
<b>"I have 500 drafts in WC"</b>	Leave them there. Finish them in WC. Only start <i>new</i> matters in MitiRisk to avoid data migration headaches.
<b>"I trust WC's legal updates"</b>	Use MitiRisk's modularity. You can update a single "Statute Clause" in MitiRisk once and it updates every future bundle instantly.
<b>"The team is used to WC"</b>	Show them the <b>Vaulting</b> . The fact that they no longer have to manually file documents is usually enough to win over the paralegals.