



Acquisition Due Diligence

EstateWorks is the industry leader in enterprise-wide management solutions for estate planning & estate settlement administration, providing comprehensive case management, task tracking, team collaboration, management reporting and document, form & letter drafting.

Since 2003, EstateWorks has served more than 75 top banks and law firms, including Bank of America, Branch Banking & Trust, Comerica, Goodwin Procter, Nixon Peabody, and Tarlow Breed Hart & Rodgers.

EstateWorks delivers their solution as Software as a Service (SaaS) solution and the business was recently acquired by a private company. The Cirrostratus Group was retained to help with the due diligence work specifically in the area of technology, SaaS infrastructure and infrastructure support. Paul Ressler, principal of The Cirrostratus Group, provided an assessment of these areas including the solution hosting partner. A review of the security, availability, performance and capacity of the infrastructure and any associated risks was undertaken and the results were used to assess the risks and opportunities associated with the acquisition.

The acquiring company appreciated the timely response from The Cirrostratus Group and relied on Paul Ressler's judgment about what items were the most important and the appropriate depth of the review.

"Paul's report provided us with the assessment and risk information that we needed on the technology strategy and Software as a Service operations to be able to make a decision about whether to purchase the EstateWorks business. The most important part of a due diligence assessment is the judgment required to understand what is important and to focus on the big picture and to make sure that any risk areas are appropriately investigated and highlighted. I'm pleased that there were no surprises after the acquisition of Estateworks and I would recommend Paul's company for any SaaS related due diligence work."

CEO of EstateWorks