Bridge the Gap: Resources for Transactional Law
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Tutorials on CALI

• Company Research: http://www.cali.org/lesson/578
• Researching & Working with Transactional Forms: http://www.cali.org/lesson/8991

Finding Form Documents

General Transactional Forms on Westlaw:

• American Jurisprudence Legal Forms 2d
• Fletcher Corporation Forms Annotated
• Nichols Cyclopedia of Legal Forms Annotated
• West’s Legal Forms
• West’s Form Finder

Model Documents:

• Bloomberg Law provides several helpful resources containing model documents, useful language and clauses, and drafting guides. All of these resources are available under the Transactional Law tab on Bloomberg Law:

  – Dealmaker Clauses: database permitting searching of clauses by title or phrase contained in the Dealmaker Documents database.
  – Dealmaker Documents: database containing 300,000 legal documents used by “top practitioners.” Clicking on the “i” next to any document type provides a technical explanation of the document.
  – Draft Analyzer: compares your draft text to its collection of documents.

• Westlaw:

  – Sample Agreements provides access to over a million executed business agreements with language, clauses, and provisions drafted by “leading law firms and in-house counsel.”
Practical Law Company (PLC): Resources for lawyers and students in transactional law practice, including corporate and securities law, and finance. Materials include overviews of transactional practice areas, model documents, checklists, timelines and flowcharts, and news on legal and market developments.

Lexis: Lexis Practice Advisor
- Form documents and language
- Explanations & Checklists

PLI Discover Plus: Practicing Law Institute provides access to treatises, forms, and CLE presentation transcripts. Practice-oriented materials on real estate law, securities law, intellectual property, etc.

Bloomberg Law/BNA Resources
- BNA Portfolios: Corporate, Taxation, Labor & Employment
- BNA Newsletters: Wide variety of topics, especially in types of law involving regulations, especially taxation, environmental law, corporate/securities, etc.

Due Diligence/Corporate Intelligence/EDGAR
- Free on EDGAR (http://www.sec.gov/edgar/searchedgar/webusers.htm)
- Lexis, Westlaw, Bloomberg Law all have access to EDGAR securities filing searches, but Bloomberg Law has an additional automated tool: Corporate Report Writer.

Specialized Databases
- Cheetah (CCH): has specialized reporters and looseleafs (a combination of primary sources, treatise, and case/agency guidance digests) for taxation, environmental law, securities, banking, and more
- Checkpoint (RIA): federal, state, and international taxation