

How To Create A Spouse's Will Using **Some** Of The Information Contained In A DPS Client File

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Purpose Of This Tutorial

- This tutorial will show you how to create a Spouse's Will, Jane Doe, which contains **some** of the information in the first Spouse's Will, John E. Doe.
- The "Name Lookup Information" is inserted in the Jane P. Doe's Will, including all names and addresses entered in John E. Doe's Will.
- Provisions of Jane P. Doe's Will is based on the Guide selected.

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Near the end of entering information in John E. Doe's Will, indicated that a Will will be created for his spouse.

Doe, John E. **Will**

Documents Will Also Be Prepared For Jane P. Doe

No
 Yes ←

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The last page of John Doe's Will shows the complete name of the client file for John E. Doe. This will be entered when you prepare the Will for Jane P. Doe.

The file name for John E. Doe is:

DoeJohnE.client ←

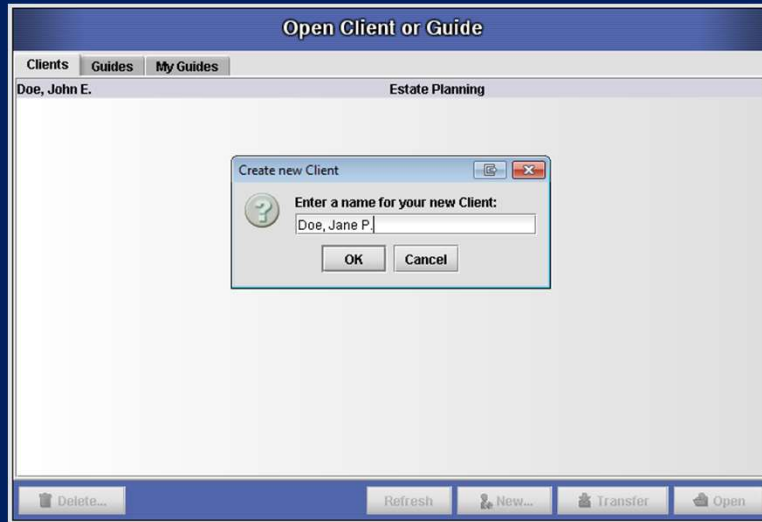
If you plan to create a client file with many of the same names and addresses, such as one for this client's spouse/partner, you may wish to copy the already established lookup information into the new file by following the steps below:

1. Create and open the 2nd client file at the "Clients and Guides" tab.
2. Choose the area of law and document you wish to create.
3. Choose a Guide and Open.
4. Enter the filename provided above and choose Next.
5. Answer the questions for the 2nd client account using the lookup button at the end of the entry box to provide you with previously entered answers.

PLEASE DISCARD THIS SHEET

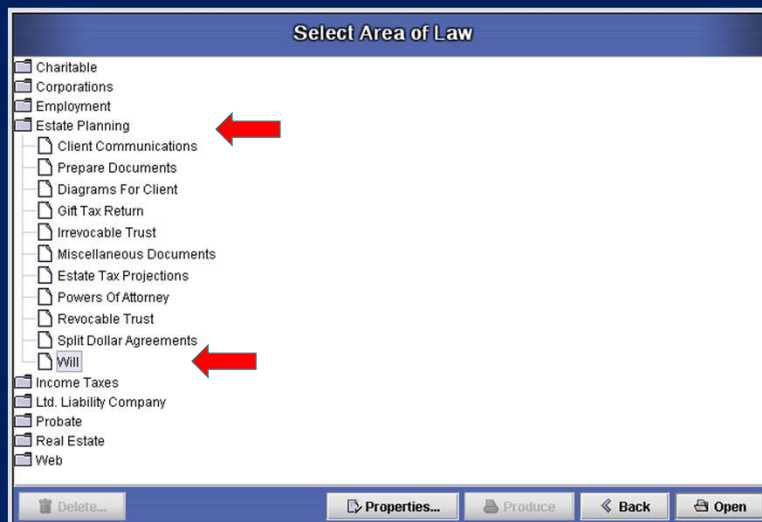
4

Create a new Client for Jane P. Doe.



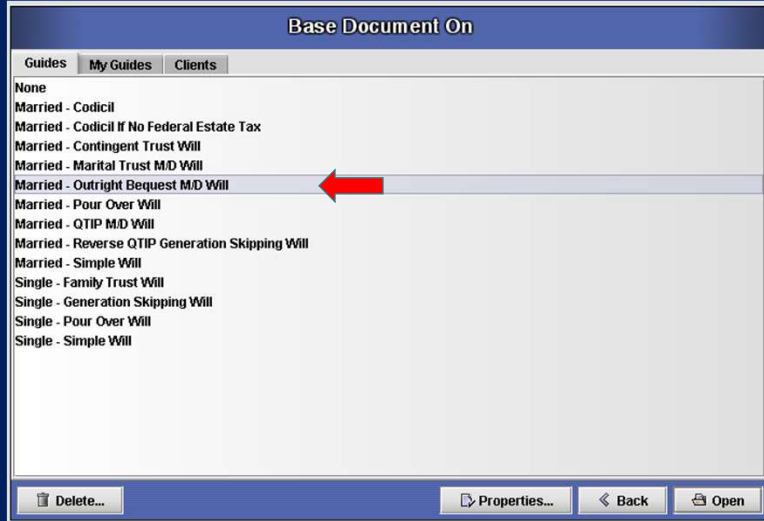
5

Open the Jane P. Doe client, selecting Estate Planning as the Area of Law and Will as the document.



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Select the appropriate Guide. Usually, this will be the same Guide as used in John E. Doe's Will.



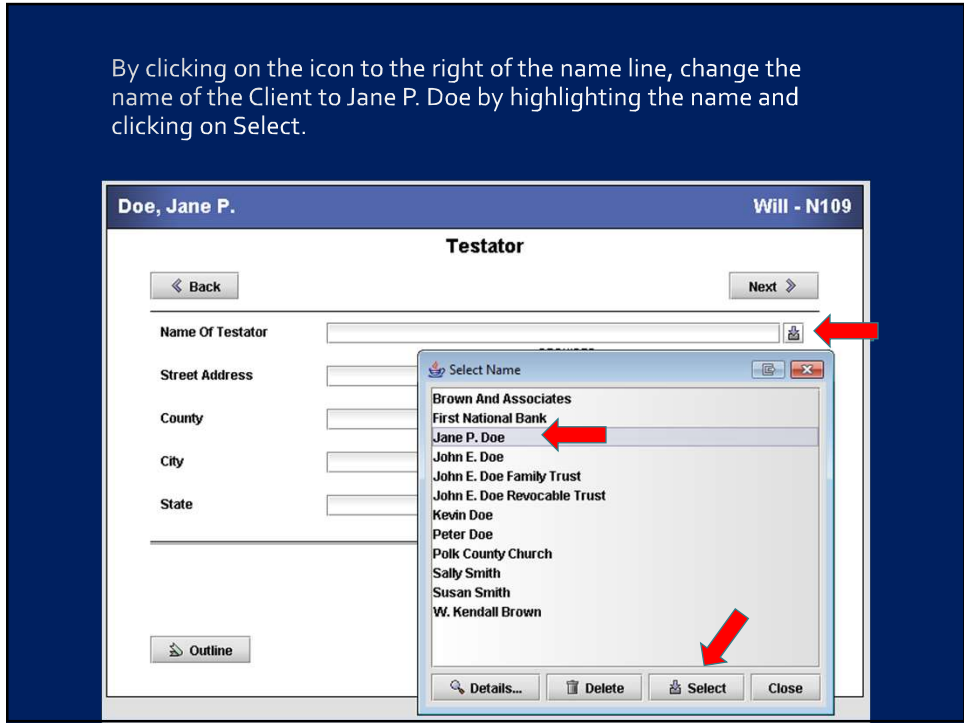
7

On the first screen, enter the client name for John E. Doe.



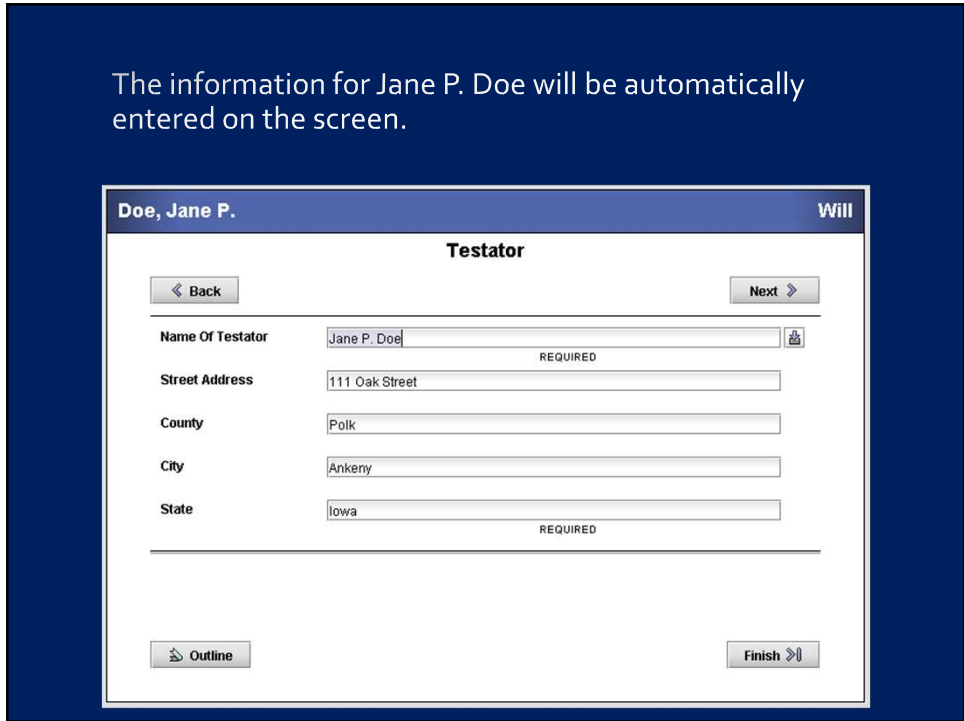
8

By clicking on the icon to the right of the name line, change the name of the Client to Jane P. Doe by highlighting the name and clicking on Select.



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The information for Jane P. Doe will be automatically entered on the screen.



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Make any necessary changes in the information for Jane P. Doe's Will.

The screenshot shows a software window titled "Doe, Jane P." with a "Will" tab. The main heading is "Gender Of Jane P. Doe". At the top, there are "Back" and "Next" navigation buttons. Below them are two radio button options: "Male" and "Female". The "Female" option is selected, and a red arrow points to it. At the bottom of the window, there are "Outline" and "Finish" buttons.

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Click on the icon to the right of the name line, to easily select names and addresses of persons or entities.

The screenshot shows a software window titled "Doe, Jane P." with a "Will" tab. The main heading is "First Successor Executor # 1". It features a form with fields for "Name Of Executor # 1 (Leave Blank if No More)", "Street Address", "City", "State", and "Zip Code". To the right of the "Name Of Executor # 1" field is a small icon, which is highlighted by a red arrow. A "Select Name" dialog box is open in the foreground, displaying a list of names and addresses: "Brown And Associates", "First National Bank", "Jane P. Doe", "Jane P. Doe Family Trust", "John E. Doe", "John E. Doe Family Trust", "John E. Doe Revocable Trust", "Kevin Doe", "Peter Doe", "Polk County Church", "Sally Smith", "Susan Smith", and "W. Kendall Brown". The dialog box has "Details...", "Delete", "Select", and "Close" buttons at the bottom.

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For additional assistance call or email
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