

How To Make Estate Planning Documents Using The Estate Planning Diagram

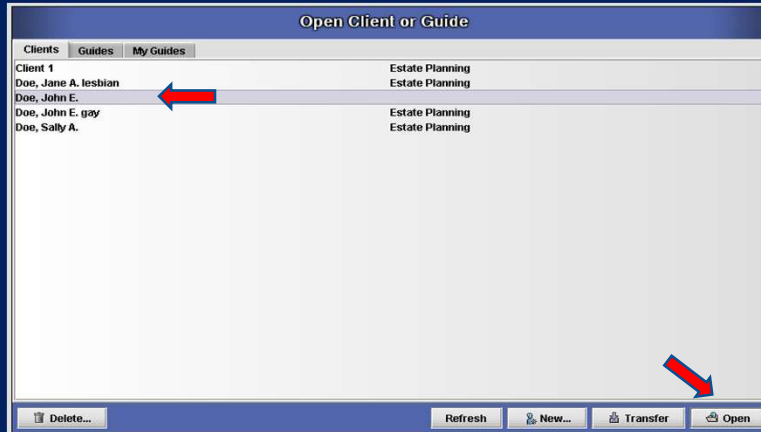
1

Purpose Of This Tutorial

- This tutorial will show you how to prepare estate planning documents, including a Diagram, quickly and efficiently.
- The Diagram is produced first.
- All answers in the Diagram Screens are automatically linked to the Screens in the other estate planning documents, including Will, Revocable Trust, Powers, etc.

2

Log in to DPS 8.0
Create a new Client
Select the new Client then select Open



3

Select Estate Planning as the Area of Law



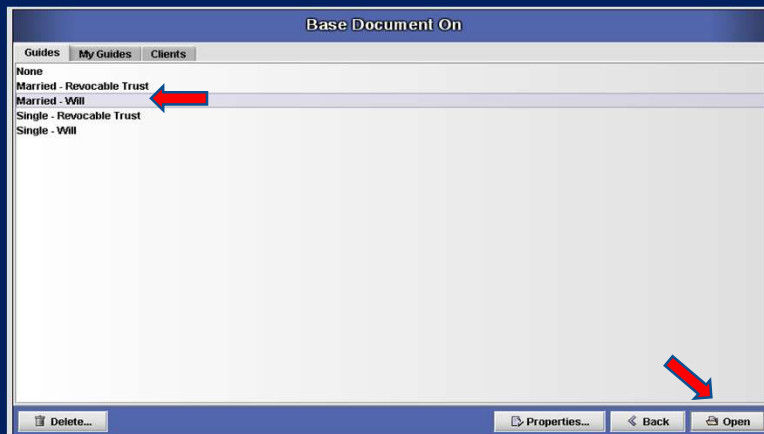
4

Select Diagrams For Clients



5

Select appropriate Guide then Open



6

Leave this page blank if there is no Import

The screenshot shows a software window titled "Doe, John E." and "Diagrams For Client". The main heading is "To Import Name Lookup Information From Another Client". At the top, there are "Back" and "Next" navigation buttons. Below them is a text input field labeled "File Name For Client (Leave Blank If No Import)". A horizontal line separates the input field from a list of instructions:

- If you have already created a client file with many of the same names and addresses, such as one for this client's spouse, you may wish to copy the already established lookup information into this file. To do that, you need to enter the original client file's name here.
- An example of a valid client file name is: SmithB client. This name is provided upon request upon completion of the original file.
- Technical support and telephone training are available by calling 800-454-7703.

At the bottom of the window, there are "Outline" and "Finish" buttons.

7

Enter all required information on all of the Screens

The screenshot shows a software window titled "Doe, John E." and "Diagrams For Client". The main heading is "Information Regarding Client". At the top, there are "Back" and "Next" navigation buttons. Below them are several form fields:

- Name Of Client:** John E. Doe (REQUIRED)
- Street Address:** 100 Main Street
- County:** Polk
- City:** Des Moines
- State:** Iowa (REQUIRED)

Below the form fields is a list of instructions:

- You are required to enter the client's full legal name and the state of his/her residence. The name and state are required to prepare the various estate planning documents.
- It is optional whether you enter the street address and city.
- The estate planning documents will be based on the laws of the state where you live.
- When you have entered all of this information, click on the NEXT button.

At the bottom of the window, there are "Outline" and "Finish" buttons.

8

Produce the Diagram
You may produce the Diagram unlimited times using the Produce button

Height Of Boxes On Estate Planning Diagram (In Inches)

Page 1 - Top Box	1.20
Page 1 - Left Box	2.50
Page 1 - Right Box	1.15
Page 1 - Bottom Box	2.05

• The height of the boxes on the diagrams can be set on this screen. We will make any necessary corrections on this screen when the documents are prepared.

9

When you produce the Diagram, DPS will remind you if there are still areas that still need information

Missing Information

These screens in your document have not been answered. If you want to answer a screen, click on it and select the Answer button. Note: Some required fields used for calculations have been left blank. You should examine your produced document to find these missing fields.

Screens:

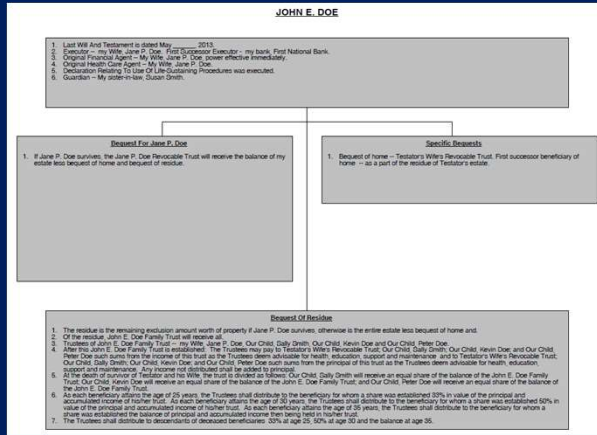
- N206.1.1 - Name Of Original Trustee # 1 (Leave Blank If No More)
- N066.2.1 - Name Of Firm

Select a method of filling in missing fields:

Lines *****

10

Diagram produced before changing box sizes



11

Change size of boxes Sizes are in 1/100 of inch

Doe, John E. **Diagrams For Client**

Height Of Boxes On Estate Planning Diagram (In Inches)

◀ Back Next ▶

Page 1 - Top Box

Page 1 - Left Box

Page 1 - Right Box

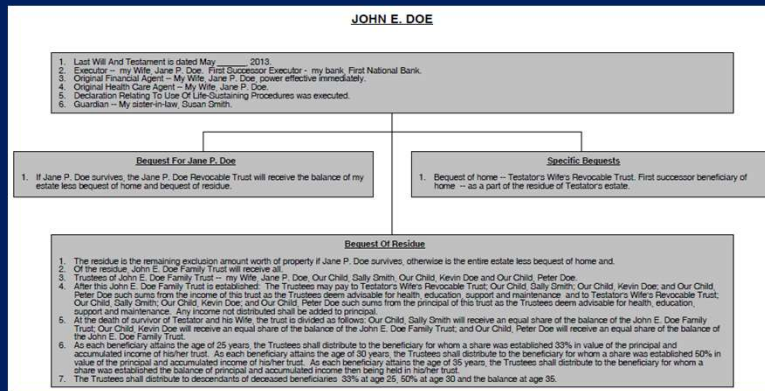
Page 1 - Bottom Box

• The height of the boxes on the diagrams can be set on this screen. We will make any necessary corrections on this screen when the documents are prepared.

Outline Finish ▶▶

12

Diagram produced after changing box sizes



13

Once the Diagram is complete you can produce the estate planning documents
 Select the document, such as Will, Powers Of Attorney, etc. and Open



14

Press Next through a few screens
 Make sure all boxes are checked on this Screen
 Select Produce to produce the Will

Clients and Guides Documents Save Produce

Doe, John E. Will

Information You Wish To Complete Or Modify

Back Next

General Information Regarding Testator, Last Will And Testament And Execution
 Testator's Family
 Provisions Of Last Will And Testament

Outline Finish

15

The Will can be produced as a PDF or as a word processing file
 Select a word processing format if you need to make minor
 changes in the provisions of the Will

Doe, John E. Will

Information You Wish To Complete Or Modify

Back Next

General Information Regarding Testator, Last Will And Testament And Execution
 Testator's Family
 Provisions Of Last Will And Testamen

Document format

Select document format:

Adobe Acrobat (PDF)

Adobe Acrobat (PDF)
 Microsoft Word (RTF)
 WordPerfect (WPD)
 Input Sheets (PDF)

Outline Finish

16

The Will is then produced

Last Will And Testament
Of
John E. Doe

I, John E. Doe, of 100 Main Street, Polk County, Des Moines, Iowa, publish and declare this to be my Last Will And Testament, hereby revoking all Last Will And Testaments executed by me.

Article I
Husband And Wife

John E. Doe and Jane P. Doe are Husband and Wife.

Article II
Children

Children of John E. Doe and Jane P. Doe, now living, are Sally Smith, Kevin Doe and Peter Doe ("Our Child" or "Our Children"). All references herein to "child" or "children" shall include the above-named children as well as all legitimate children hereafter born to or adopted by me.

Article III
Debts And Expenses

I direct that all my legally enforceable debts and funeral and testamentary expenses be fully paid from my estate as soon after my death as can properly be done. However, it is not my

17

For additional assistance call or email
Support
Advanced Logic Systems
515-282-7702
support@dps8.com

18