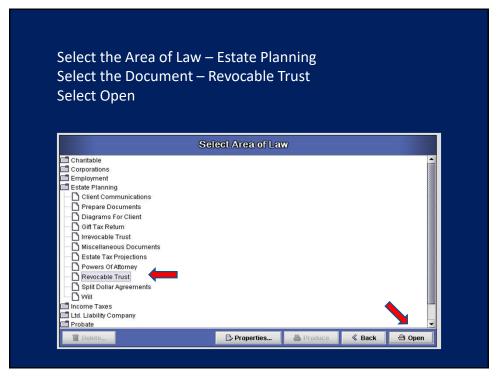
How To Use My Guides In DPS

Purpose Of This Tutorial

- This tutorial will show you how to create and use your customized Guides in DPS.
- You can create your own customized Guides if you find that the Guides provided with DPS do not cover typical situations you encounter in your practice.

First you must determine the DPS Guide which is closest to what you want for your customized Guide Create a new client and Select Open

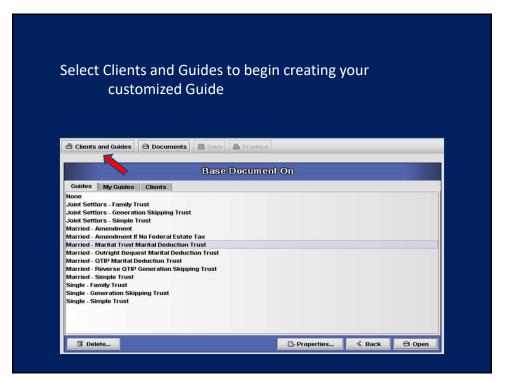
Clients Guides My Guides	
Client 1	Estate Planning
Doe, Jane A. lesbian	Estate Planning
Doe, John E.	Estate Planning
Doe, John E. gay	Estate Planning
New Client	



On the Base Document On screen Guides tab Note the exact name of the DPS Guide which is closest to what you want for your customized Guide

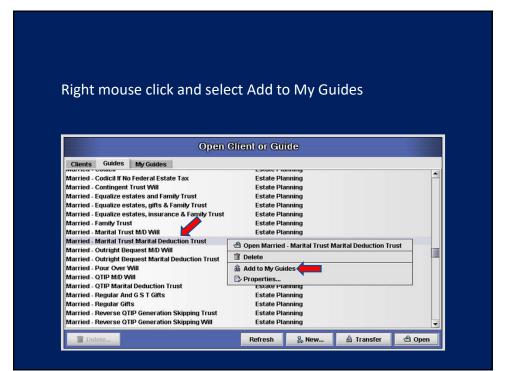
Guides	My Guides	Clients				
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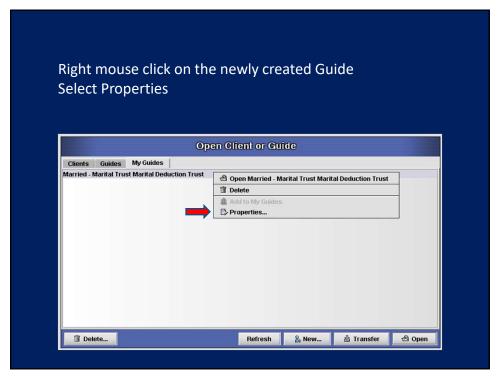


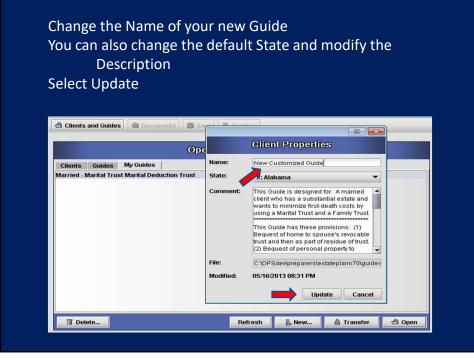
Select Guides Select the DPS Guide which is most similar to the Guide you want to create

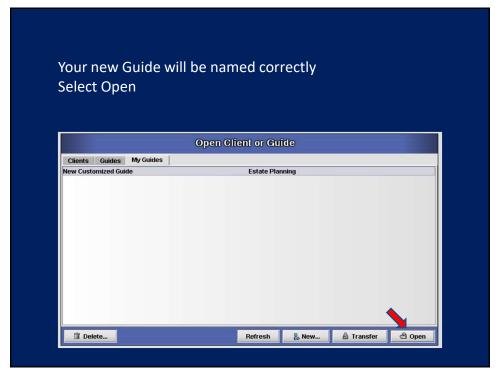
Clients Guides My G	uides	LOUGTR				
Married - Codicil If No Feder	al Estate Tax	Estate Pla			-	
Married - Contingent Trust V	vill	Estate Pla	anning			
Married - Equalize estates a	nd Family Trust	Estate Pla	anning			
Married - Equalize estates,	gifts & Family Trust	Estate Pla	anning			
Married - Equalize estates, i	nsurance & Family Trust	Estate Pla	anning			
Married - Family Trust		Estate Pla				
Married - Marital Trust M/D Will		Estate Pla				
Married - Marital Trust Mari	al Deduction Trust	Estate Pla	anning 🔶 🦛			
Married - Outright Bequest I	M/D Will	Estate Pla	anning		100	
Married - Outright Bequest I	Marital Deduction Trust	Estate Pla	anning		1000	
Married - Pour Over Will		Estate Pla	anning			
Married - QTIP M/D Will		Estate Pla	anning			
Married - QTIP Marital Dedu	ction Trust	Estate Pla	anning			
Married - Regular And G S T Gifts		Estate Planning				
Married - Regular Gifts		Estate Planning				
Married - Reverse QTIP Generation Skipping Trust		Estate Planning				
Married - Reverse QTIP Generation Skipping Will		Estate Pla	anning		•	
Transference (Construction)		Refresh	& New	쓥 Transfer	🕙 Open	



Select the My Guides tab			
Open	Client or Guide		
Clients Guides My Guides			
Joint Settions - Family Trust	Estate Planning		-
Joint Settlors - Generation Skipping Trust	Estate Planning		
Joint Settlors - Simple Trust 🛛 💙 L L C With Manager	Estate Planning Ltd. Liability Company		
L C With Member-Manager	Ltd. Liability Company		
L L C With Officers			
Letter Message			
Married - Amendment	Guide created!		
Married - Amendment If No Federal Es	June createn.		
Married - Codicil Married - Codicil If No Federal Estate T	ок		
Married - Contingent Trust Will	Laboration		
Married - Equalize estates and Family Trust	Estate Planning		
Married - Equalize estates, gifts & Family Trust	Estate Planning		
Married - Equalize estates, insurance & Family Trust	Estate Planning		
Married - Family Trust	Estate Planning		
Married - Marital Trust M/D Will	Estate Planning		
Married - Marital Trust Marital Deduction Trust	Estate Planning		
	Refresh 🔒 New	💩 Transfer	🕙 Open

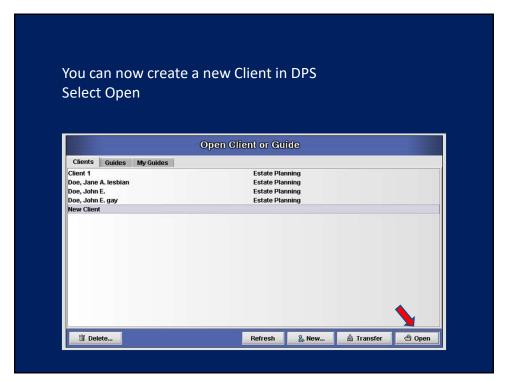






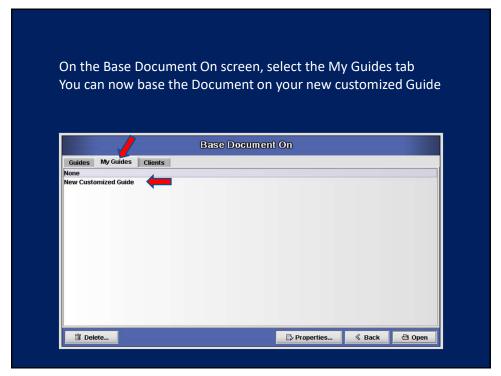
Open the Document and make all necessary changes Save the Document when all changes have been made

0	pen Document			
Setate Planning Client Communications Prepare Documents Git Tax Return Git Tax Return Irrevocable Trust Setate Tax Projections Powers Of Attorney Split Dollar Agreements Vill	-			
Î Delete	Properties	🔒 Produce	Back Back	🖨 Open



Select the Area of Law – Estate Planning Select the Document – Revocable Trust Select Open

S	elect Area of La	w		
Charitable Corporations				A
Employment				
Estate Planning				
Client Communications				
- Prepare Documents				
Diagrams For Client				
Gift Tax Return				
Irrevocable Trust				
Miscellaneous Documents				
Bestate Tax Projections				
Powers Of Attorney				
🗋 Revocable Trust				
Split Dollar Agreements				
Income Taxes				▲ 💾
Ltd. Liability Company				
Probate				
Tolete	> Properties	A Produce	Back	🗄 Open



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