

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

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.

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

Back Next

No

Yes

Outline Finish

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:

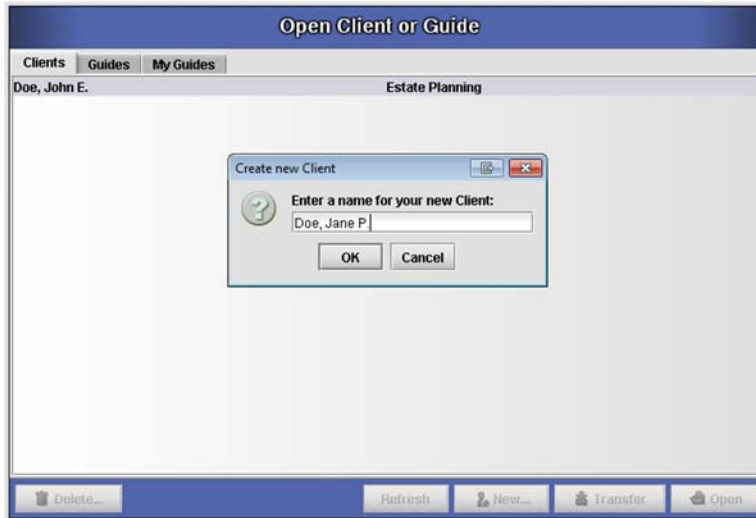
DoeJohnE.client

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:

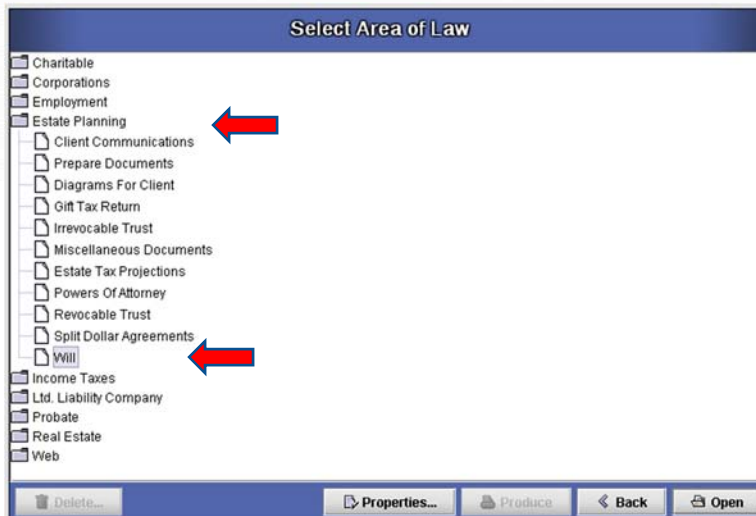
1. Create and open the 2nd client file at the "Clients and Guides" tab.
2. Choose the area of law and document you wish to create.
3. Choose a Guide and Open.
4. Enter the filename provided above and choose Next.
5. Answer the questions for the 2nd client account using the lookup button at the end of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

PLEASE DISCARD THIS SHEET

Create a new Client for Jane P. Doe.



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



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

Base Document On

Guides My Guides Clients

None
Married - Codicil
Married - Codicil If No Federal Estate Tax
Married - Contingent Trust Will
Married - Marital Trust M/D Will
Married - Outright Bequest M/D Will
Married - Pour Over Will
Married - QTIP M/D Will
Married - Reverse QTIP Generation Skipping Will
Married - Simple Will
Single - Family Trust Will
Single - Generation Skipping Will
Single - Pour Over Will
Single - Simple Will

Delete... Properties... Back Open

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

Doe, Jane P. Will

To Import Name Lookup Information From Another Client

Back Next

File Name For Client
(Leave Blank if No Import) DoeJohnE.client

• 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 800.454.7702

Outline Finish

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.

The screenshot shows a web form titled "Testator" for "Doe, Jane P." with a reference "Will - N109". The form has fields for "Name Of Testator", "Street Address", "County", "City", and "State". A "Select Name" dialog box is open over the "Name Of Testator" field. The dialog lists several names: "Brown And Associates", "First National Bank", "Jane P. Doe", "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 "Jane P. Doe" entry is highlighted. Red arrows indicate the selection process: one points to the selection icon on the right of the "Name Of Testator" field, another points to the "Jane P. Doe" entry in the list, and a third points to the "Select" button at the bottom of the dialog.

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

The screenshot shows the "Testator" form with the following information entered: "Name Of Testator" is "Jane P. Doe" (marked as REQUIRED), "Street Address" is "111 Oak Street", "County" is "Polk", "City" is "Ankeny", and "State" is "Iowa" (marked as REQUIRED). The "Finish" button is visible at the bottom right.

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 sub-header "Will". The main title 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.

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 sub-header "Will". The main title is "First Successor Executor # 1". At the top, there are "Back" and "Next" navigation buttons. Below them is a form with several fields: "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. A red arrow points to this icon. A "Select Name" dialog box is open in the foreground, displaying a list of names and addresses, including "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". At the bottom of the dialog box are "Details...", "Delete", "Select", and "Close" buttons.



**For additional assistance call or email
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