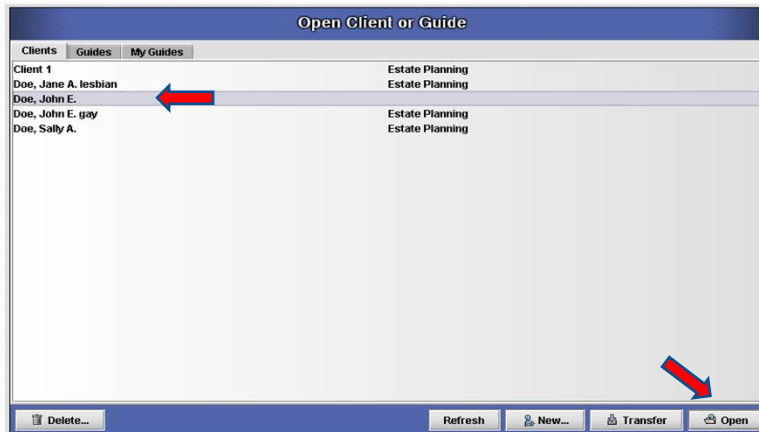


How To Make Estate Planning Documents Using The Estate Planning Diagram

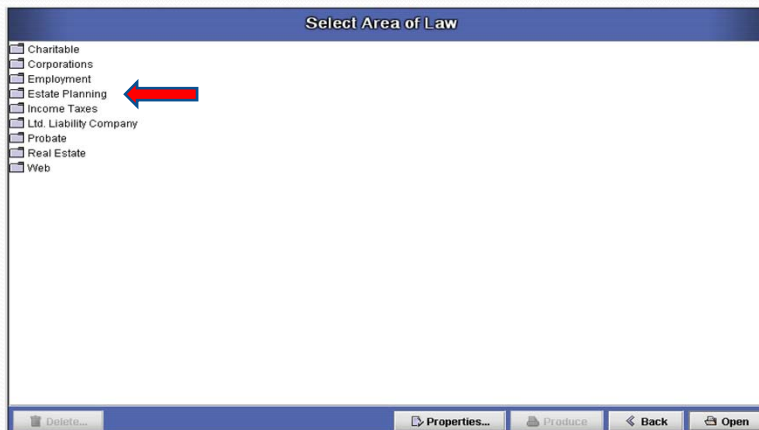
Purpose Of This Tutorial

- 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.

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



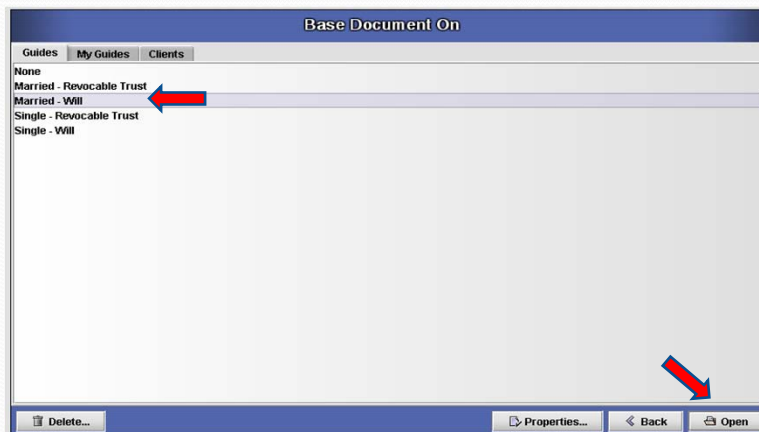
Select Estate Planning as the Area of Law



Select Diagrams For Clients



Select appropriate Guide then Open



Leave this page blank if there is no Import

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

To Import Name Lookup Information From Another Client

◀ Back Next ▶

File Name For Client (Leave Blank If No Import)

- 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.

🏠 Outline Finish ▶▶

Enter all required information on all of the Screens

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

Information Regarding Client

◀ Back Next ▶

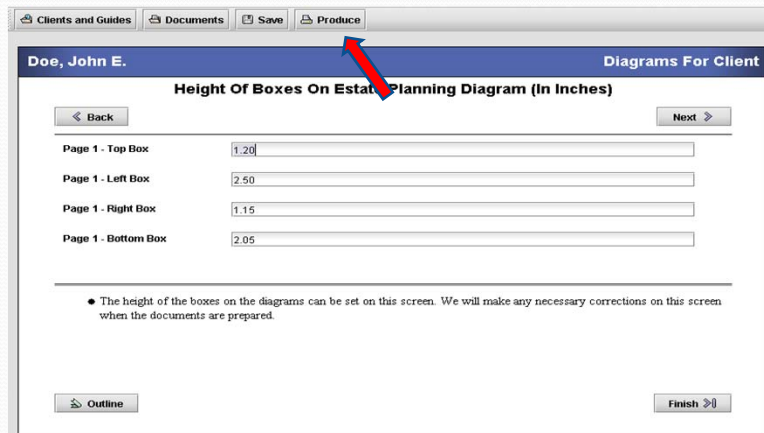
Name Of Client	<input type="text" value="John E. Doe"/> <small>REQUIRED</small>	<input type="button" value="🏠"/>
Street Address	<input type="text" value="100 Main Street"/>	
County	<input type="text" value="Polk"/>	
City	<input type="text" value="Des Moines"/>	
State	<input type="text" value="Iowa"/> <small>REQUIRED</small>	

- 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.

🏠 Outline Finish ▶▶

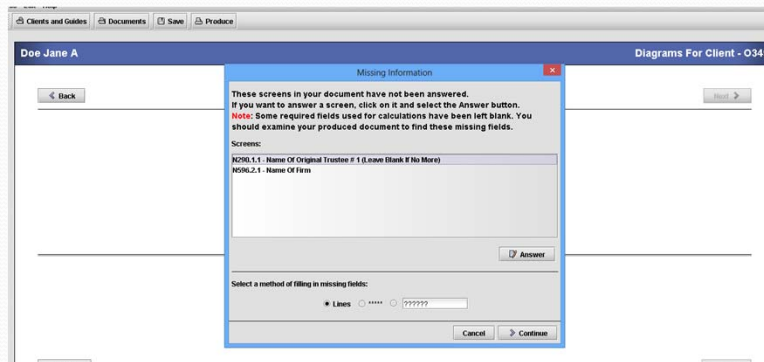
Produce the Diagram

You may produce the Diagram unlimited times using the Produce button



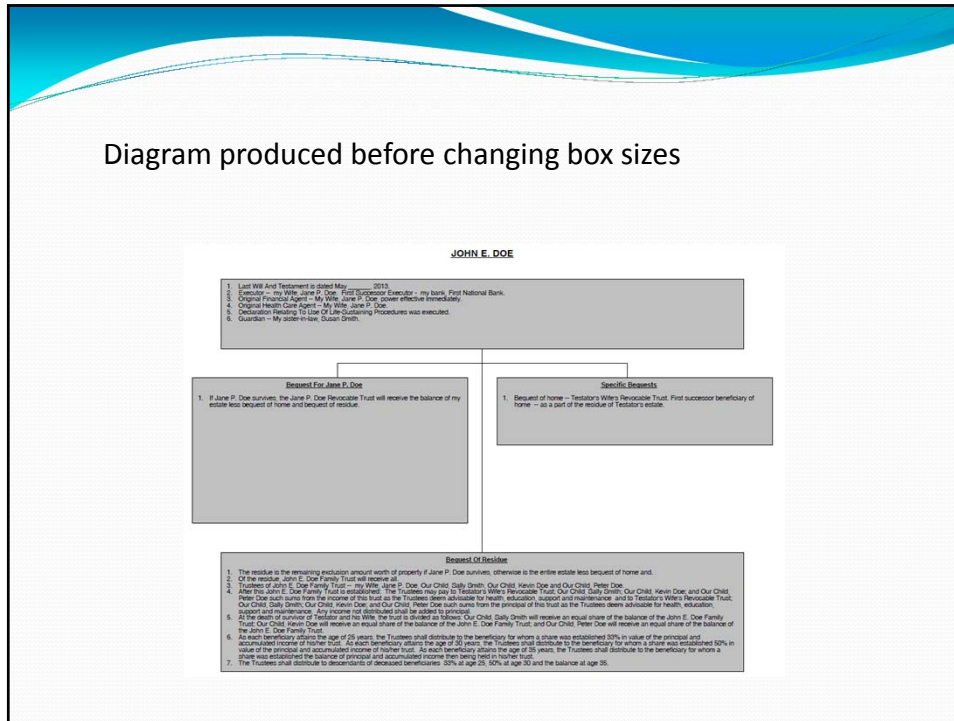
The screenshot shows a software window with a menu bar containing 'Clients and Guides', 'Documents', 'Save', and 'Produce'. A red arrow points to the 'Produce' button. Below the menu bar, the window title is 'Doe, John E.' and 'Diagrams For Client'. The main content area is titled 'Height Of Boxes On Estate Planning Diagram (In Inches)'. It contains four input fields: 'Page 1 - Top Box' (1.20), 'Page 1 - Left Box' (2.50), 'Page 1 - Right Box' (1.15), and 'Page 1 - Bottom Box' (2.05). There are 'Back' and 'Next' buttons at the top of the content area. At the bottom, there are 'Outline' and 'Finish' buttons. A note at the bottom of the content area reads: '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.'

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



The screenshot shows a software window with a menu bar containing 'Clients and Guides', 'Documents', 'Save', and 'Produce'. The window title is 'Doe Jane A' and 'Diagrams For Client - 0349'. A 'Missing Information' dialog box is open in the center. The dialog box contains the following text: '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.' Below this text, there is a list of screens: 'NR06.1.1 - Name Of Original Trustee # 1 (Leave Blank If No More)' and 'NR06.2.1 - Name Of Firm'. There is an 'Answer' button next to the list. At the bottom of the dialog box, there is a section titled 'Select a method of filling in missing fields:' with a radio button selected for 'Lines' and a text input field containing '??????'. There are 'Cancel' and 'Continue' buttons at the bottom of the dialog box.

Diagram produced before changing box sizes



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

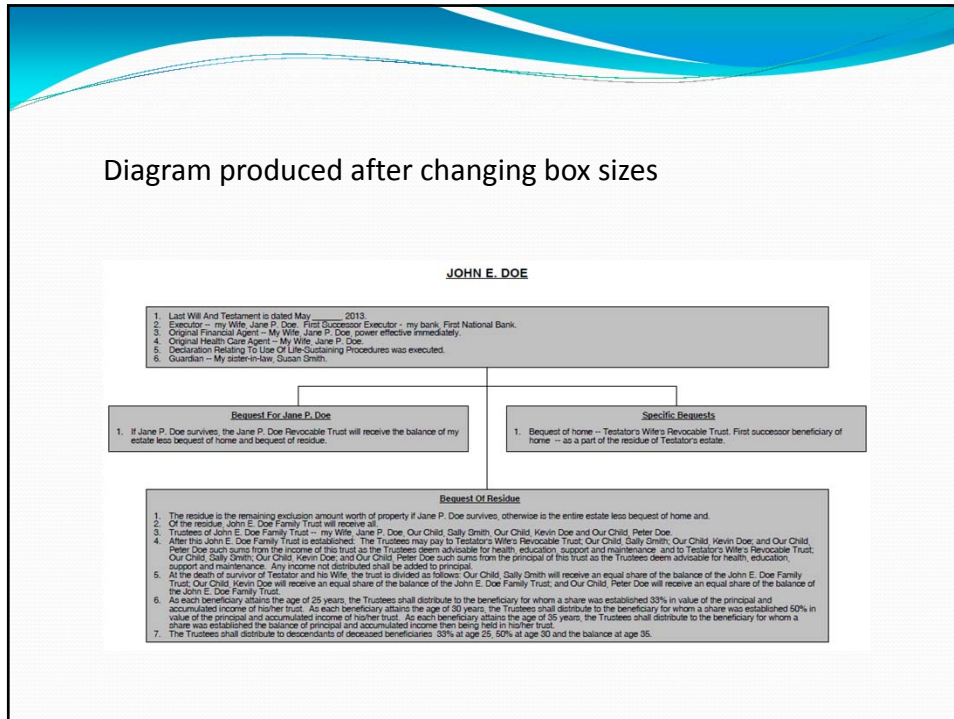
Doe, John E. **Diagrams For Client**

Height Of Boxes On Estate Planning Diagram (In Inches)

Page 1 - Top Box	<input style="width: 80%;" type="text" value=".80"/>
Page 1 - Left Box	<input style="width: 80%;" type="text" value=".60"/>
Page 1 - Right Box	<input style="width: 80%;" type="text" value=".60"/>
Page 1 - Bottom Box	<input style="width: 80%;" type="text" value="2.00"/>

• 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.

Diagram produced after changing box sizes



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



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

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 (MPD)
- Input Sheets (PDF)

Outline Finish

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

For additional assistance call or email

Xan Taylor

Advanced Logic Systems

1-800-454-7703

support@dps8.com