PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

1. Go to http://www.DPS8.com/ep-system.php and select Click here to Use Estate Planning System.

2. On the screen below, login using your email address and a secure password. Check “Remember my login information” if desired . Click on “Continue”.

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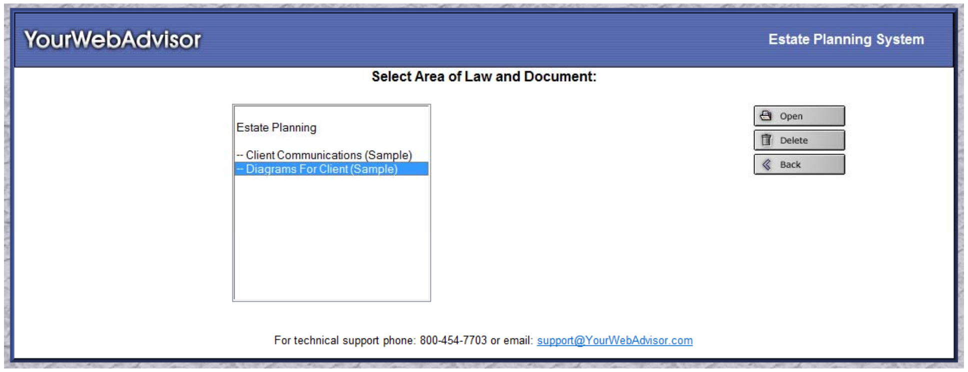
3. On the screen below, click on “New” to create a new client or select the client to be modified and click on “Open”.

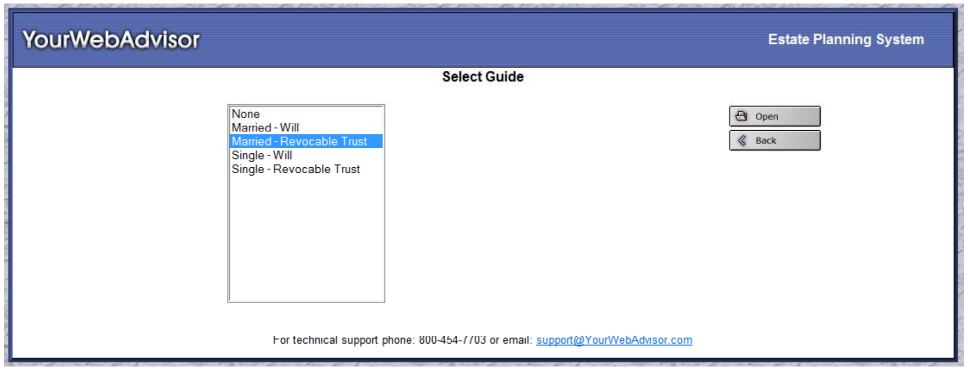
4. For a new client, on the screen below, enter the client’s name and select the state of residence. Click on “Create’. When you return to the screen above, select the client name and click on “Open”.

PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

5. On the screen below, highlight "Diagrams For Client" and click on "Open".



6. On the screen below, highlight the guide that most closely reflects your client and click on "Open".



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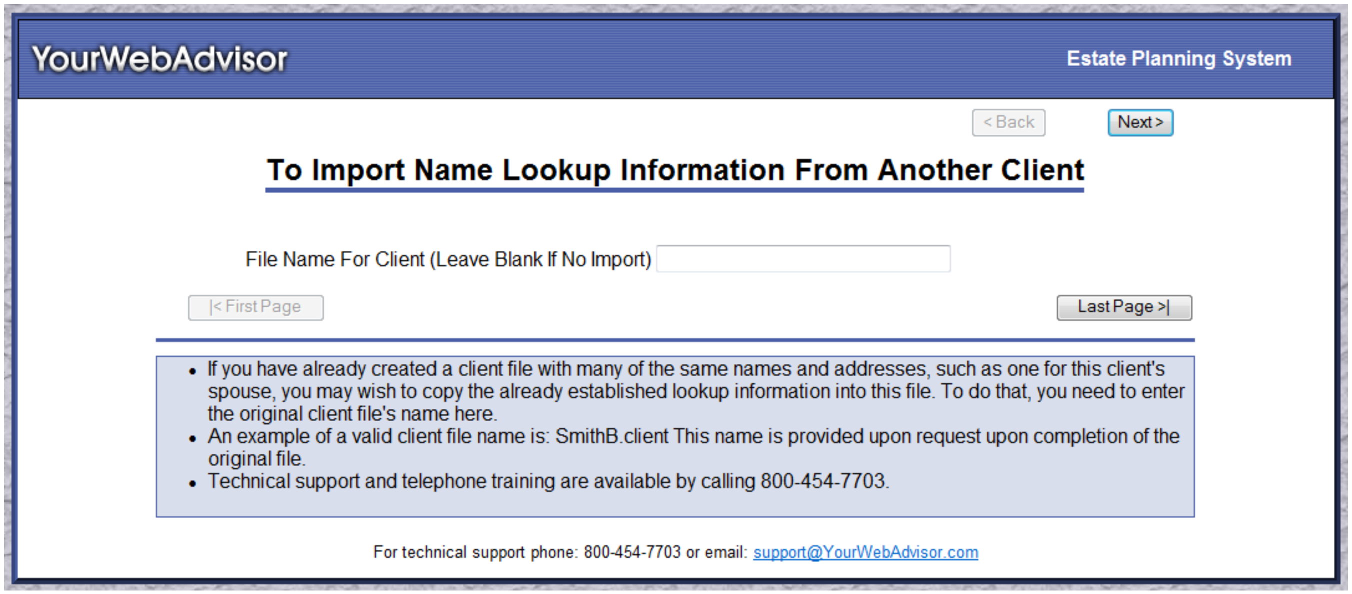
PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

7. If you have prepared documents for the spouse, enter the file name for the spouse. If not, leave this screen blank. Click on "Next" when ready.



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PROCEDURE FOR
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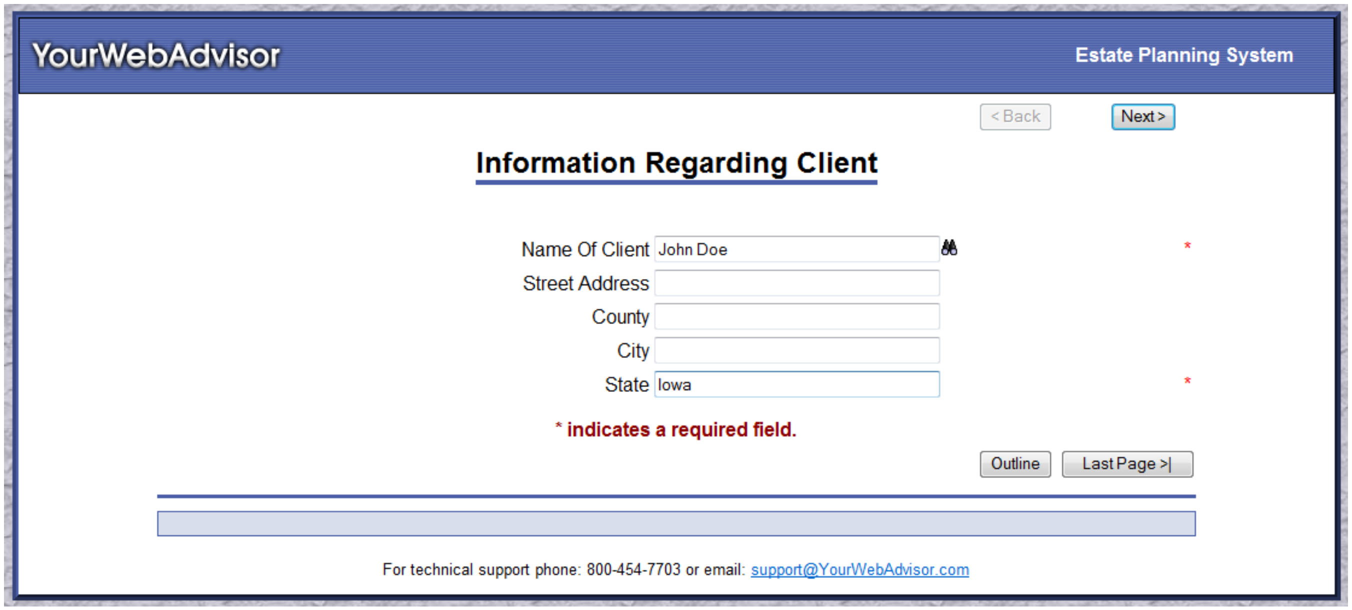
8. On the screens which follow, enter the information requested. Note the red star on a line indicates that the information is required. Note that the icon to the right of a line allows you to lookup names and related information previously entered.

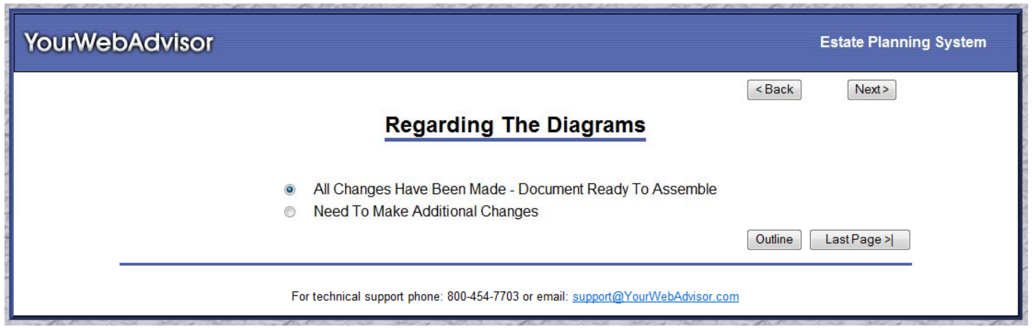


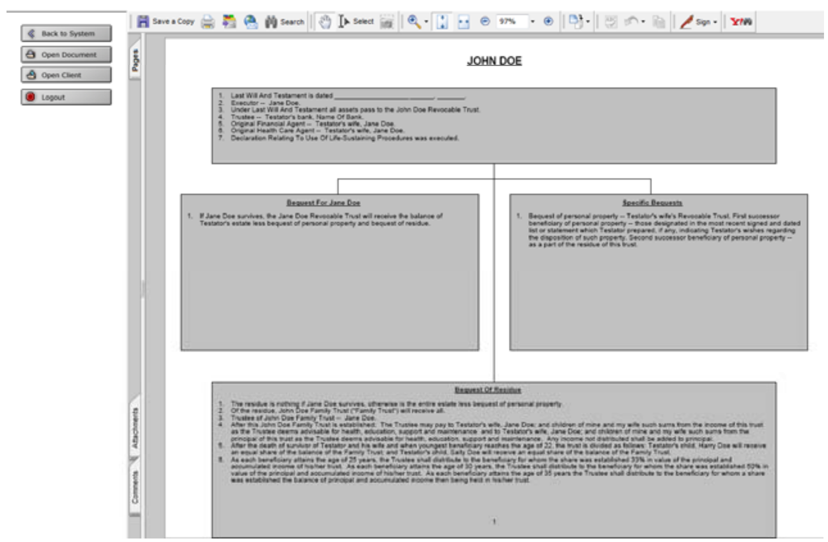
PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

9. If you will also prepare documents for the spouse, select Yes on this screen. When the diagram is produced a sheet which indicates the file name of this client will also be produced. If you enter that file name on the first screen for the spouse, common information will be inserted into the spouse's file.

PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

10. After you leave the screen below the diagrams for the client will be created as shown below.

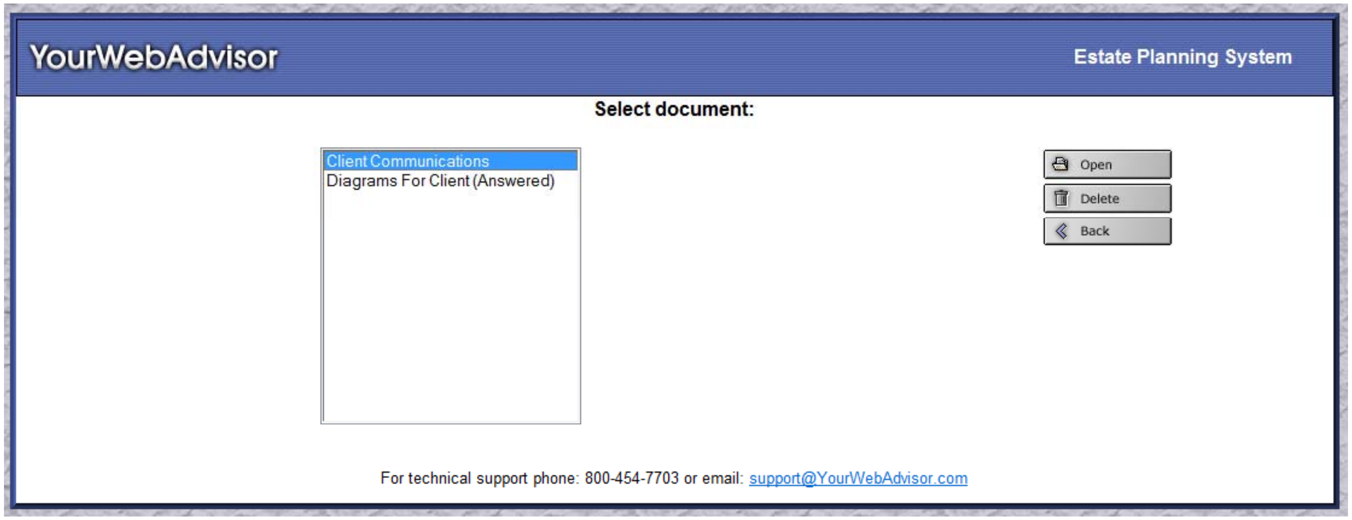




PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

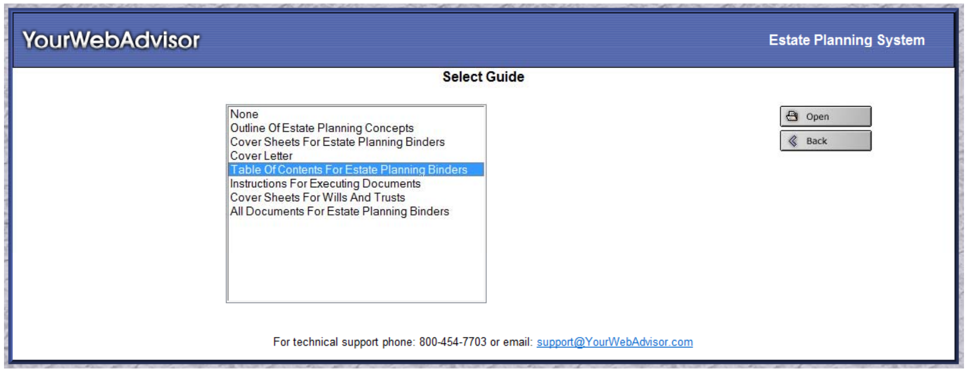
11. If changes need to be made click on “Back to System” and make the necessary changes until the diagrams correctly reflect your plan. You may print the diagrams or save them on your computer.

12. To notify us that the diagrams are complete and to create cover sheets for the estate planning binder, the table of contents, the cover sheets for the wills and trusts and the instructions for execution click on “Open Document”, highlight “Client Communications” and click on “Open”.



PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

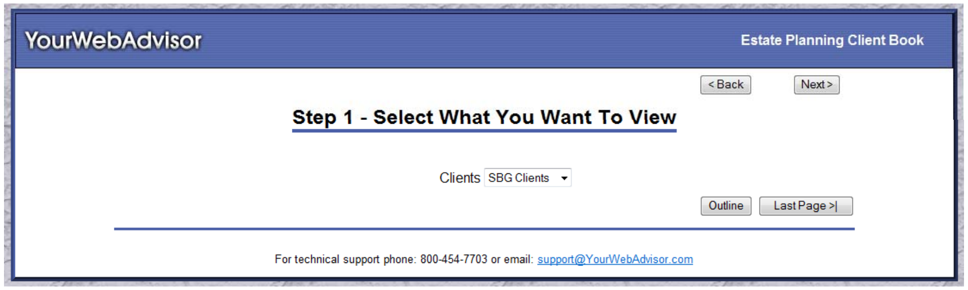
13. On the screen below, highlight "Cover Sheets - Table Of Contents - Instructions For Execution" and click on "Open".



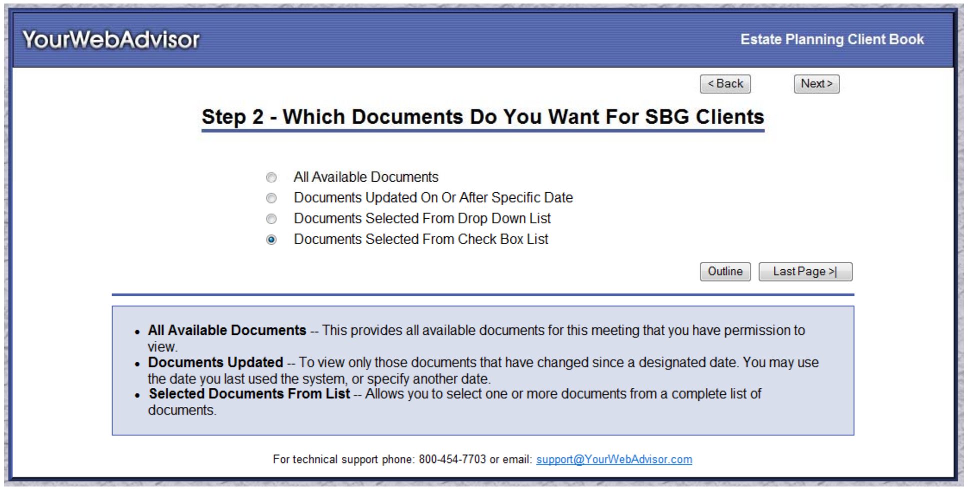
14. On the screens which follow, enter the information requested. Make sure "Send Email That Diagrams Are Completed" is checked on the screen below as this will send us an email so we can prepare the necessary estate planning documents. Print the Communication documents created for use in the estate planning binder and execution copies.

PROCEDURE FOR ESTATE PLANNING SYSTEM ON WEB

15. When you receive an email telling you that documents have been completed for specific client(s) (Client 1, Client 55, etc.) go to http://www.DPS8.com/ep_system.php and click on **Click here to Use Estate Planning Client Book.** Login using your email address and password. Click on “Continue”. On the screen below, select your company’s clients and click on “Next”.

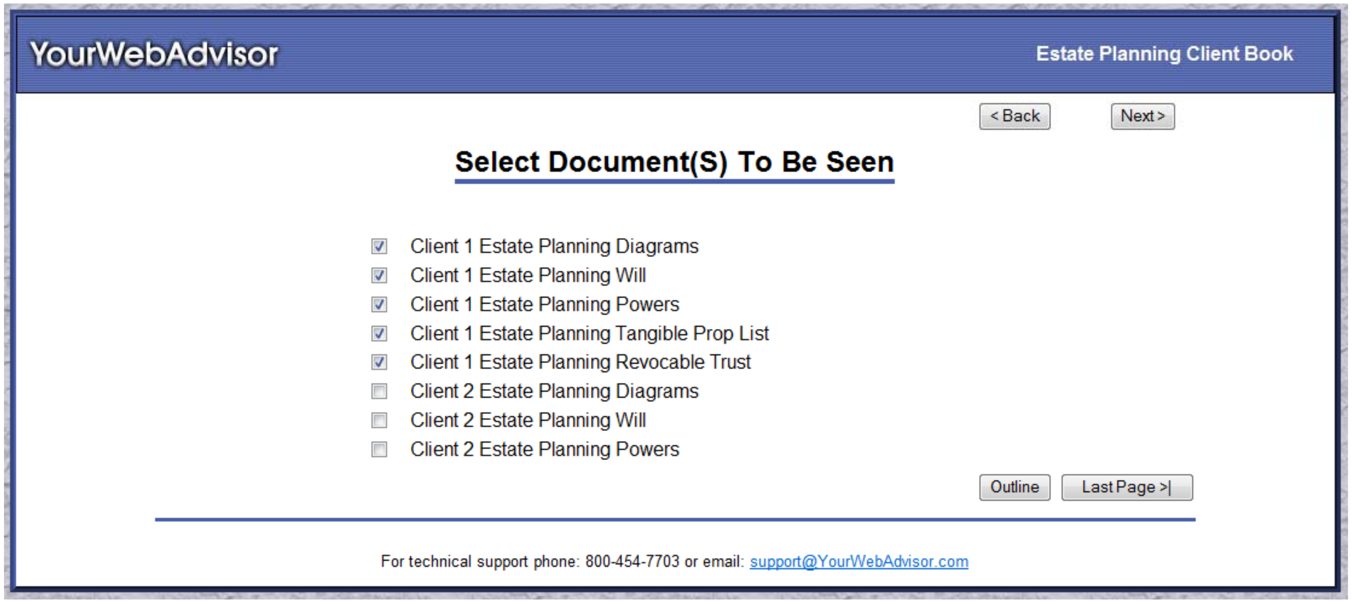


16. On the screen below, select “Documents Selected From Check Box List” and click on “Next”.



PROCEDURE FOR
ESTATE PLANNING SYSTEM ON WEB

17. On the following screens check the documents you wish to receive and print. Print copies for binder and execution. The Instructions For Execution (requested in step 14 above) will specify the number of copies needed for execution. When you have selected all required documents you can click on "Last Page".



18. Meet with client and execute documents following Instructions For Execution.