



## 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”.

YourWebAdvisor Estate Planning System

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**Welcome To Estate Planning System**

Please enter your Email and Password. Your password must be at least 8 letters and must contain a capital letter. If you have forgotten your password, attempt to log in leaving the password blank. Estate Planning System will respond with "Invalid password" in red and provide a way to request that the valid password be sent to your email address.

[Click here](#) if you want to change your email address.  
[Click here](#) if you want to change your password.

Email address:

Password:

Repeat password:

Remember my login information:

  
VERIFYP

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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”.

The screenshot shows the 'YourWebAdvisor' interface with the title 'Estate Planning System'. The main heading is 'Select and Open Client OR Choose New'. On the left, there is a vertical list box containing the word 'client'. To the right of the list box are four buttons: 'Open', 'New', 'Delete', and 'Properties'. At the bottom of the interface, there is a footer with technical support information: 'For technical support phone: 800-454-7703 or email: [support@YourWebAdvisor.com](mailto:support@YourWebAdvisor.com)'.

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”.

The screenshot shows the 'YourWebAdvisor' interface with the title 'Estate Planning System'. The main heading is 'Select and Open Client OR Choose New'. On the left, there are two labels: 'Name:' and 'State:'. To the right of 'Name:' is a text input field containing 'John Doe'. To the right of 'State:' is a dropdown menu with 'Iowa' selected. At the bottom right of the form area are two buttons: 'Cancel' and 'Create'. At the bottom of the interface, there is a footer with technical support information: 'For technical support phone: 800-454-7703 or email: [support@YourWebAdvisor.com](mailto:support@YourWebAdvisor.com)'.



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

YourWebAdvisor Estate Planning System

Select Area of Law and Document:

- Estate Planning
- Client Communications (Sample)
- Diagrams For Client (Sample)**

Open  
Delete  
Back

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

YourWebAdvisor Estate Planning System

Select Guide

- None
- Married - Will
- Married - Revocable Trust**
- Single - Will
- Single - Revocable Trust

Open  
Back

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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.

YourWebAdvisor Estate Planning System

**To Import Name Lookup Information From Another Client**

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.

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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.

YourWebAdvisor Estate Planning System

### Information Regarding Client

Name Of Client  \*

Street Address

County

City

State  \*

\* indicates a required field.

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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.

The screenshot shows a web browser window with the title 'YourWebAdvisor' and 'Estate Planning System'. The main content area has a blue header with the text 'YourWebAdvisor' on the left and 'Estate Planning System' on the right. Below the header, there are two buttons: '< Back' and 'Next >'. The main heading is 'Documents Will Also Be Prepared For Name Of Spouse'. Below this heading, there are two radio button options: 'No' (unselected) and 'Yes' (selected). At the bottom of the form area, there are two buttons: '< First Page' and 'Last Page >'. Below the form area, there is a line of text: 'For technical support phone: 800-454-7703 or email: [support@YourWebAdvisor.com](mailto:support@YourWebAdvisor.com)'.



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

YourWebAdvisor Estate Planning System

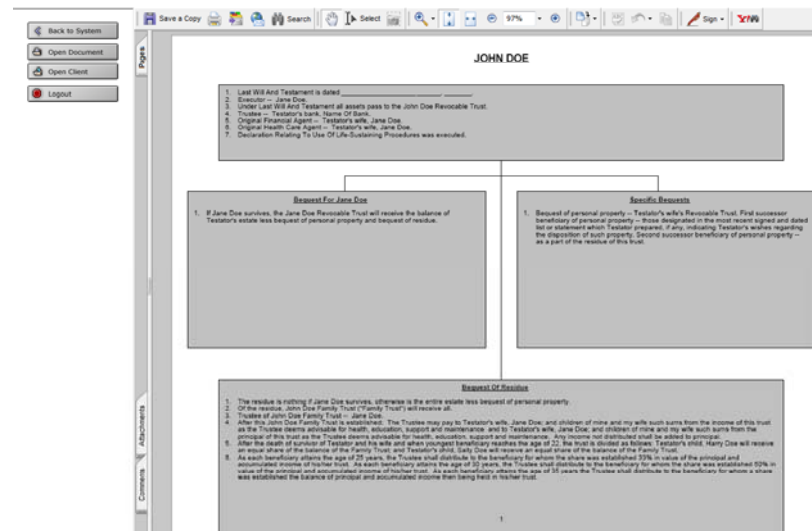
< Back Next >

### Regarding The Diagrams

- All Changes Have Been Made - Document Ready To Assemble
- Need To Make Additional Changes

Outline Last Page >

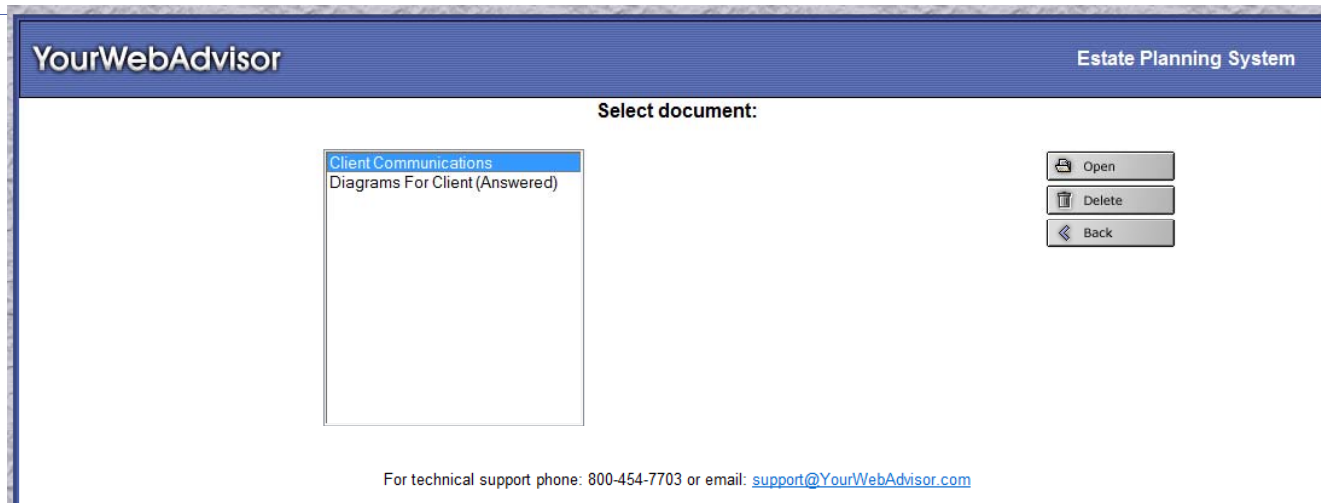
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11. If changes need to be made click on "Back to System" and make the necessary changes until the diagrams correctly reflect your plan. You may print the diagrams or save them on your computer.
12. To notify us that the diagrams are complete and to 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".







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

YourWebAdvisor Estate Planning System

Select Guide

- None
- Outline Of Estate Planning Concepts
- Cover Sheets For Estate Planning Binders
- Cover Letter
- Table Of Contents For Estate Planning Binders**
- Instructions For Executing Documents
- Cover Sheets For Wills And Trusts
- All Documents For Estate Planning Binders

Open Back

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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.

YourWebAdvisor Estate Planning System

< Back Next >

**Client Communication Documents Wanted**

- Outline Of Estate Planning Concepts
- Cover Sheets For Estate Planning Binders
- Table Of Contents For Estate Planning Binders
- Cover Sheets For Last Will And Testament And Trusts
- Instructions For Executing Documents
- Cover Letter
- Send Email That Diagrams Are Completed

Outline Last Page >

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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](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".

YourWebAdvisor Estate Planning Client Book

< Back Next >

**Step 1 - Select What You Want To View**

Clients SBG Clients ▾

Outline Last Page >|

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

YourWebAdvisor Estate Planning Client Book

< Back Next >

**Step 2 - Which Documents Do You Want For SBG Clients**

All Available Documents

Documents Updated On Or After Specific Date

Documents Selected From Drop Down List

Documents Selected From Check Box List

Outline Last Page >|

**• All Available Documents** -- This provides all available documents for this meeting that you have permission to view.

**• Documents Updated** -- To view only those documents that have changed since a designated date. You may use the date you last used the system, or specify another date.

**• Selected Documents From List** -- Allows you to select one or more documents from a complete list of documents.

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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".

The screenshot shows a web browser window with the following content:

- Header: "YourWebAdvisor" on the left and "Estate Planning Client Book" on the right.
- Navigation: "< Back" and "Next >" buttons.
- Section: "Select Document(S) To Be Seen"
- List of documents with checkboxes:
  - Client 1 Estate Planning Diagrams
  - Client 1 Estate Planning Will
  - Client 1 Estate Planning Powers
  - Client 1 Estate Planning Tangible Prop List
  - Client 1 Estate Planning Revocable Trust
  - Client 2 Estate Planning Diagrams
  - Client 2 Estate Planning Will
  - Client 2 Estate Planning Powers
- Footer: "Outline" and "Last Page >|" buttons.
- Footnote: "For technical support phone: 800-454-7703 or email: [support@YourWebAdvisor.com](mailto:support@YourWebAdvisor.com)"

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