Individual users of the application can control which screens (if any) they would like to be loaded when the application starts. An individual user can opt to display any, all, or none of the four main screens. A screen shot showing how the application looks on startup when all four screens are selected to be shown on startup is shown below:

Father - Ik	H Irau.				
Hon Activity C	alendar for July 200	4			
Addre	Activity Cale	ndar - Extended Viev	N		- 0 >
Туре:	July,	2004	August, 2004	September, 2004	1 Month
	Sun Mon Tue W	ed Thu Fri Sat Sur	n Mon Tue Wed Thu Fri S	Sat Sun Mon Tue Wed Thu Fri Sat Start M	lonth:
Line 2: 8:00 AM	lone —	Activity Reminders			
Line 3: 8:30 AM	4 5 6		Activity and Asset R	leminders for Jack	
9:00 AM		ne activity items below have	e not been marked as complete.	To mark an item as complete, check the box to the left o	of the item.
< Prev 9:30 AM 10:00 AM	- 11 12 1:		a 1		
10:30 AM		CActivity Reminders	S Asset Reminders		1
11:00 AM	18 19 21	Date	Time/Actv Type	Description	
10 11:30 AM		12/19/2003	5:30 pm - 7:30 pm	History Contractory	
12:00 PM	<u> </u>	12/24/2003	6:00 am - 12:00 am	Vacation Day	
12.30 rm		12/25/2003	6:00 am - 12:00 am	Vacation Day	
H 07		12/31/2003	11:00 am - 12:00 pm	Winner of the	
V 07 Contac		01/02/2004	7:30 pm - 9:30 pm	Hannahara an ann an ann an an an an an an an an	
12		01/03/2004	4:00 pm - 7:00 pm	Harden Commercial State	
		01/04/2004	9:30 am - 11:30 am	Finance Care Calls	
01		01/09/2004	9:00 pm - 11:00 pm	Frank California (California)	
ö	3 4 5	1/12/2004	8:00 pm - 10:00 pm	House Participation	
		01/16/2004	7:00 pm - 9:00 pm	Finance Water and	
		01/21/2004	10:00 am - 1:00 pm	Trust Delivery (
< Prev		01/22/2004	9:00 am - 12:00 pm	Trust Delivery (
	17 18 1 <u>1</u>	01/24/2004	12:00 pm - 3:00 pm	An I P P	
		01/25/2004	11:30 am - 2:30 pm		
	24 25 21	01/29/2004	10:00 am - 12:00 pm	Office Meeting	
		01/30/2004	9:00 pm - 11:00 pm	Real and a second second second	-
	31	1			
			Legend		
		Print Activity Reminders	Past-Due Items	Items Due Today 🛛 📕 Items Due in the Future	e

The **Contact Search/Maintenance Screen** is a "two part" screen that enables you to search for contacts matching specific criteria on the first screen (the "Search" part), and to add or update contact data on the second screen (the "Maintenance" part).

Contact Search/Maintenance Screen in "Search" mode:

Limit by Dete Last Updated From Dete: 563 match(es) found. Hon First Name Mill Last Name Spouse First Name Title Company	Search By:	Group		Search Type: Ex	act Match 🗾 Search V	alue:	<u>_</u>	3ea
563 match(es) found.	🗖 Li	mit by Date Last Upda	ted	From Date:	<u>√</u> To	Date:		
553 match(es) found. Hon First Name ML Last Name Title Company Image: Ima								
Hon HistName Mill LastName Spouse FirstName Title Company Q1 V V V V V V Q1 V V V V V Q2 V V V V V Q2 V V V V V Q3 V V V V V Q4 V V V<	563 match(es) found.	1	1				
	Fion	First Name	MI	Lastiname	Spouse First Name		Company	_
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	62		- 2-					
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Contact Search/Maintenance Screen in "Maintenance" mode.

	d Nersler I		ng linet e		- [Co	ntact Search/	Maintenance	Screen (M	laintenanc	e)]				Į	- 8 ×
- Change	Hon	First Nan	ne	MI	LastName			Jr/Sr I	Company	Name					Pri?
Contract	Mr.	✓ John		J	Doe			· •	Test Sem	iinar	_	_	_	_	•
	Hon	Spouse I	First Name	ML	Spouse Las	t Name		Jr/Sr	Title						-
	Mrs.	✓ Jane		J	Doe			-							•
Activities	Addre	ss —							Phone	Number	s/Emai	I			
	Type:	Home	🗂 1 of	4 address	es Zip Cd:	Std? 🔽	19001 -	-	Туре	Std?	Phon	e #/Email/	/URL	Ext	Def?
Ext Cal	Line 1:	123 Mocking	bird Lane		City:	Abington	St	PA 🔹	Home	• •	(610) 123	- 4556		• 📕
Reminder	Line 2:				County:	Montgomer	У	•	BUSINE	S• 🔽	(215) 323	- 4242		•
	Line 3:				Country	USA		Def? 🔽	Cell	•	(610) 902	- 0203		c 💌
Reports	< Prev	Add Add	dr Del A	ddr De	eed Info	View List	Cancel	Next >	< Pre	v 3	Ph	ones 1 to	o 3	Nex	d3>
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Current S	earch: Gr	oup =	124 of	568									7/19/20	004 10	:21 PM

Add/Update Deed Information					_ 🗆 🗙
Add/Update D	eed Infe	ormatio	n		
Addr Type: Home		Zip Cd:	19001		-
Addr Line 1: 123 Mockingbird Lane		City:	Abington		St PA
Addr Line 2:		County:	Montgomery	i.	
Addr Line 3:		Country	USA		Def? 🔽
School District: Bradford		Parcel Nbr:	ABC-1234		
Assessed Value: \$180,000.00	CLRF; 1.30	Fair Mkt Val:	\$234,000.00)	
Property Type: Residential	-86 - 79	COT Book #:	1745	COT Page #	374-A
Deed Rec'd: 01 / 01 / 2004		Recorded:	\Box / \Box	/	
Prep Charge: \$50.00		Fee Paid:	02 / 02	/ 2004	
Quit Claim Deed Variable Text:					
ALL THAT CERTAIN lot or or to be erected or to be erected, situate in to a Plan and Survey made by as follows, viz:	piece of ground the	with the building of the City	s and improv of Philadelpl	ements thereon hia, described a :, dated July	ccording 20, 1956
BEGINNING at the corner fo Avenue as shown on the City Plan (one h l (seventy feet wide) thence ex along the said Northwesterly side o: distant two hundred ninety-two feet four	rmed by the inter undred feet wide tending North thi , Eighty-tu inches Southeast	rsection of the No) but not legally o rty-nine degrees wo feet three and wardly along the	orthwesterly open, with th fourteen min seven-eights same, from t	side of e Northwesterl utes five second inches to a poi he Southeasterl	y side of ds West nt, y side of ┏
Cancel	Delete D	eed Info		Save	

The Activities Tab

Contac	t Search/Maintena	nce So	сге	en (Maintenand	:e)		
Hon	First Name	MI	La	ast Name		Jr/Sr	Company Name Pri?
Mr. 💌	John	J	D	oe			Test Seminar 🔰 🗖
Hon	Spouse First Name	MI	Sp	oouse Last Name		Jr/Sr	Title
Mrs. 💌	Jane	J	D	oe		•	×
Addr T	Addr Line 1	1	A	City	State	Zip/Postal	Phone Numbers/Email
🔠 Home	123 Mockingbird Lane			Abington	PA	19001	Type Std? Phone #/Email/URL Ext Del?
🔐 Office	678 Front Street			Philadelphia	PA	19199	Home 💌 🔽 (610) 123 - 4556 🛛 📀 🗶
Inve	6738 Marter Ave.			Moorestown	NJ	08057	
🔐 Church	123 Holy Ave.			Pennsburg	PA	18073	BUSIN 🗾 🔽 (215) 323 - 4242 1234 🔿 🗶
1						•	Cell 💌 🔽 (610) 902 - 0203 📄 C 🗾
Add Add	dress Edit Add	ress		Delete Address)eed Info	< Prev 3 Phones 1 to 3 Next 3 >
Activi	ties 🛛 🎯 Contact Histor	w 🕑	No	otes 600 Groups	D Trus	t Info]	
Acty D	ate Description		_				Users R
8/02	/2004 [John Doe (Test	Semina	r)] A	.ppt (3:30 pm - 5:30	<mark>թա)</mark> : Trust	Delivery	. O Add
07/22	/2004 [dohn Doe (Test	Semina Text Se	r)] A	ppt (1:00 pm - 2:00	pm); Finan	icial Appointme	ent O Upd
05/25	/2004 [Lester Williams] /2004 [Maru Smith (Tes	t Semin	aril	ar)) 10-00 (Complete): Cor	ej, serio (r ofirm Annoi	ntment	
05/18	2004 [Mary Smith (Tes	t Semin	arl]	Call (Complete); Cal	1		O Del
8 11/12	/2003 [Harvey Jones (T	est Ser	nina	r)] Appt (10:00 am -	11:00 am)	;Lead i , Ti	
			_				Shat
< Prev	Save Delete Ac	ld New	,	Add Sim Bus Ca	rd Cano	cel Return to	o Search Quick Letter Print Go To Trust Next >

Updating an Activity

Activity Maintenance		_ 🗆 🗙
Update Activity Activity Details Set for TMS User(s): Image: Check All Check All Uncheck All	Activity Type • Appointment • Call • To Do • Creeping Description: Trust Delivery • Appointment Time: 8 / 2 / 2004 • 3:30 PM • 3:30 PM • Appointment Duration: Reminder Start Date: 2 Hours • 7 / 22 / 2004 • 7 / 22 / 2004 • 7 / 22 / 2004 • Notes: Take Route 123 and get off at exit 456. • • • • • • • • • • • • • • •	Recurring Item Details Recurring Item End Date Interval Daily Daily Weekly Monthly Weekly Item Occurs: Every Sunday Sunday Friday Tuesday Saturday Weehesday
John Doe (Test Seminar)	Find Contact Remove Con	ntact Go To Contact Add New Contact
Save + Exit Save + Ad	Id New Activity Delete + Exit Delete + A	dd New Activity Cancel

Contac	t Search/Ma	aintenance 5	cree	en (Mainter	iance)									- 🗆 🗵
Hon	First Name		MI	Last Name			Jr/Sr	-	Company	Name	~			Pri?
Mr. 💌	John		J	Doe				-	Test Sen	ninar	2			•
Hon	Spouse First	Name	MI	Spouse Las	t Name		Jr/Sr		Title					
Mrs. 💌	Jane		J	Doe				•	1					•
Addr T	Addr Line 1	2	A	A City		State	Zip/Pos	tal	Phone	Num	bers/En	nail —	1000	
Home	123 Mockin	igbird Lane		Abington	i	PA	19001		Type	5	td? Phor	ne #/Em	all/URL E	xt Der?
🛛 🔠 Office	678 Front S	treet		Philadelp	ohia I	PA	19199		Home	• 6	✓ (610) 123	- 4556	💌 🍋
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Add Ad	dress	Edit Address		Delete	Address	De	ed Info		< Pre	v 3	Ph	ones 1	to 3	Next 3 >
Activ	ities 🧭 Co	ntact History	ß	Notes 600	Groups	🕼 Trust li	nfo							
Conta	ct Date	Notes											Trust Event	
8/2/2	004	[John Doe (T	est S	ieminar)] Date	e Delivered		0.00	1	1				Date Deliver	ed Add
7/26/	2804	[John Doe (T	est S	ieminar)]Date	e Printed				1				Date Printed	
7/19/	2004	[John Doe (T	est S	eminar)] Pre-	Approval S	ent)			Pre-Approva	ISe Upd
6/8/2	004	[Lester Willian	ms []	est Seminar]	Sent app.	contract ar	nd check	(#1)	234 for \$5	00.		1-2122/00	1	
2 1711	72003 ~~	to Oak St. Ma	s (16 sker	est Seminar)] ight on Oak	Directions - Proceed at	таке Hout pprox. 1 mil i	e 123 to e and ma	ke le	45. Make eft on Che	stnut. E	light, Con Blue hous	anue se on		Del
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< Prev	Save D	elete Add N	lew	Add Sim	Bus Card	Cance	I Retu	im to	Search	Quic	k Letter	Print	Go To Tr	ust Next >

The Trust Screens

The trust screens are displayed as a "tabbed dialog" interface, shown on the screen shots to follow. The purpose of the trust screens is to enter and maintain the data required for the application to generate a set of trust documents ("estate planning portfolio") for a given contact.

John J. Doe and Jane J. Doe -	Client Info				
🛞 Agent Summary	Directives	🔠 Deeds	🕉 Assets	🛱 Photo	🎒 Print
👬 Client Info 🛛 🔗 Childr	en 🔰 🎁 Beneficiaries	🛛 😽 Trustees 📔 🖥	Pour Over Will	POA (Assets)	📔 🕂 POA (Health Care) 📗
- Contact Info					
	Ma Jaha J Dag				Trust Type
	Mr. John J. Doe				
Address (Line 1):	123 Mockingbird Lane				C. Inint
City/State/Zip:	Abington, PA 19001				Juni
🙀 County:	Montgomery				
🚔 Phone Number:	(610) 123-4556				C In Status
 					
Client Personal Info					
Mr/Mrs/Ms First Name		MI LastName		Jr/Sr	Social Security Nbr
Mr. John		J. Doe			111 _ 11 _ 1111
DOB: 01 / 01	/ 1920 M/F: M 💌	MarSt M 💌	Physician:	Duffy, Scott S.	- 189
	,				
Spouse Personal Info					
Mrs/Ms First Name		_ MI_LastName		Jr/Sr	Social Security Nbr
Mrs. 💌 Jane		J Doe		▼	222 - 22 - 2222
	/ 1920 Ann Doto:		Dhusisian:	Smith Josoph	
	Ann Date.		Physician.	omin, oosepn	<u> </u>
-Widowed Clients Only-					
Deceased Spouse Full Nam	e.			Date of Death	
	1				
Changes will be saved auto	omatically when you leave	this tab unless you press	the "Cancel Upd	late" button.	Cancel Update

The Client Info Tab

The Children Tab

	lohn J.	Doe and Jane J	. Doe	- Children (and O	ther Ag	jents)			-						
	🕂 PO)A (Health Care)	1	🛞 Agent Summa	ry [🖙 Directiv	es	🔠 Dee	eds	🖇 Asse	ets	()	Photo	🎒 F	rint
	*∦ ₽ C	lient Info	ଙ୍ଟ	Children	🎁 Be	eneficiaries		🧐 Trustees	s	📆 Pou	r Over '	Will	a	POA (Asse	ts)
s	electa	a child/agent fro	om th	e list below to Up	odate o	or Delete. To	add a	new child/	'agent, i	use the Ac	ld butt	ton.			_
	lon	FirstName	MI	LastName	Suff	Address			City		St	Zip	0	County	<u> </u> P
9	Mr.	Scott		Doe		1234 Moun	tain Vi	ew Drive	Danie	lsville	PA	18038	1	lortham	<u>e</u>
8	MS.	Carole	M	Doe		987 State S	street		Willing	gboro	NJ	08046		lurlington	(/
8	PMr.	Larry		Doe		56/8 Barba	ara La Stroot	ne	VVIIIIng	gporo	DA	10007		Jurlington	(3
8	y ivis.	Sally	~	Due		709 E. 1101	Suce		NORM	ampion	PA	10067	P	ionnam	(C
															<u> </u>
	Currer	nt Record —													
	Mr/Ms	s First Name				ML	Last	Name						Jr/S	ir 🗌
	h.de	- Scott				[C									
	pvn.	⊥] ³⁰⁰ "				P	D0e								<u> </u>
	Addre	ess													
	12341	Mountain View	Drive	9											
	, Zip Co	ode Citv	,				S	tate Co	ount∨			Τe	elephon	e Number	
	18038		niole	مالان			[nthamp	iton			s10 \ 2	90 200	12
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	Date (of Birth	So	cial Security Nb	r N	I/E Cł	hild of		Cli	ient to Age	ent	А	aent to (Client	
	04.4		11	1 11 2245			Minut -	and Connectors		ionicio i ige			90	Silon	
	104 1	01 / 1360	111	= = 2345			lient a	na Spouse							<u> </u>
		1	1		1			1				1			
		Add		<u>U</u> pdate		[Delete			<u>S</u> ave				Cancel	
_															

The Beneficiaries Tab

John J. Doe and Jane J. Doe - Beneficiaries	s X
+ POA (Health Care) 🧐 Agent Summary 📭 🙀 Client Info 🥰 Children 🎁 Beneficia	≫ Directives 🚰 Deeds 🗊 Assets 🛱 Photo 🍰 Print aries 🤟 Trustees 🦖 Pour Over Will 🗎 POA (Assets)
Available Agents: S Larry F. Doe (Child, DOB = 3/1/55) Scott C. Doe (Child, DOB = 4/1/60) Carole M. Doe (Child, DOB = 5/1/62) Sally A. Doe (Child, DOB = 3/2/73)	Select for: 1st Distribute Shares Equally 2nd 3rd
	4th Share of Estate:
lst	
2nd	<u>۲</u>
3rd	
4th	N V
< Prev 4 Next 4 >	
Changes will be saved automatically when you leave this t	ab unless you press the "Cancel Update" button.

The Agent Summary Tab

The Agent Summary tab lists the Client and Spouse's children and other agents, as well as their agent assignments for Beneficiaries, Successor Trustees, Pour-Over Will, Power of Attorney for Assets, and power of Attorney for Health Care, so that all of these selections may be viewed at a glance.

Jo	hn J. Doe and Ja	ane J. Doe - Agent Summary
Ň	Client Info	🛷 Children 📔 🎁 Beneficiaries 📔 😽 Trustees 📔 节 Pour Over Will 📔 🔛 POA (Assets)
•	POA (Health Care	a) 🚿 Agent Summary 🛛 🖙 Directives 📄 🚰 Deeds 🗍 🇊 Assets 🗎 🖾 Photo 🗎 ᢖ Print
		<u>CLIENT</u> <u>SPOUSE</u>
- 6 8	Children	Larry F. Doe (DOB = 3/1/1955) Scott C. Doe (DOB = 4/1/1960) Carole M. Doe (DOB = 5/1/1962)
**	Other Agents	
Ö	Beneficiaries	Larry F. Doe (Share = 1/4) Scott C. Doe (Share = 1/4) Carole M. Doe (Share = 1/4)
~	Successor Trustees	1. Scott C. Doe 2. Carole M. Doe 3. Larry F. Doe
, and a second se	POW Executors	1. Jane J. Doe I. John J. Doe 2. Larry F. Doe I. John J. Doe 2. Scott C. Doe I. John J. Doe
	Durable POAs for Assets	1. Jane J. Doe I. John J. Doe 2. Larry F. Doe I. John J. Doe 3. Scott C. Doe I. John J. Doe
0	Durable POAs for Health Care	1. Jane J. Doe I. John J. Doe 2. Larry F. Doe I. John J. Doe 2. Scott C. Doe I. John J. Doe
		Print Agent Summary Report

The Directives Tab

John J. Doe and Jane J. Doe - Directives
– 🙀 Client Info 📔 🛷 Children 📔 🎁 Beneficiaries 📔 🏍 Trustees 📔 🏺 Pour Over Will 📔 🔛 POA (Assets) 📔
🕂 🕂 POA (Health Care) 📔 🚿 Agent Summary 🛛 🖙 Directives 🛛 🚰 Deeds 🗍 🌋 Assets 🗎 🖾 Photo 🗍 🍰 Print 🗍
FIRST
I direct that all estate and inheritance taxes payable as a result of my death, not limited to taxes assessed on property, shall be paid out of the residue of my Estate, and shall not be deducted or collected from any League, Devisee, or Beneficiary hereunder.
SECOND
be divided equally among that person's issue per stirpes. In the event any such predeceased beneficiary leaves no surviving children or issue, then all of that person's share shall be distributed to the remaining Beneficiaries.
In the event all of my named beneficiaries and their children and issue predecease me, all of the trust estate is to be distributed to my heirs at law.
< Previous 3 Next 3 >
Changes will be saved automatically when you leave this tab unless you press the "Cancel Update" button.

The Deeds Tab

John J. Doe and Jane J. Doe - Deeds	
👔 🙀 Client Info 📔 🥙 Children 📔 🎁 Beneficiaries 📔 😾 Trustees 📔 🤔 Pour Over Will 📔 🎒 POA (/	Assets)
🕂 🕂 POA (Health Care) 🛛 🚿 Agent Summary 🛛 🖙 Directives 🛛 🚮 Deeds 🛛 🗊 Assets 🛛 🚳 Photo 🛛 🔮	🗿 Print 🏢
Quit Claim Deed Date	
Specify Quit Claim Deed Date 8 / 5 /2004	
C Leave Blank in Doc	
Select Action	
O Print to Printer	
Print to Screen (Print Preview)	
🔿 Save Only	
Go	

👯 Print Preview						_ 8 ×									
\$	L	e the she the she the	* • 2 • • • • • • • • • • • •	· · · 2 · · · 1 · · · 3 · <u>1</u> ·	1 4 [5 .										
Quit Claim Deed															
State SOV			1	QUIT CLAIR	M DEED										
۵	÷		THIS INDE	VTURE made the 5th day of	August, 2004.										
Quit Claim Deed State SOV			BETWEEN "Grantor") having ar Commonwealth of I LIVING TRUST (Mockingbird Lane, 19001.	JOHN J. DOE and JANE J. a address of 123 Mockingbird Pennsylvania, 19001 and TH hereinafter called the "Gr Abington, Montgomery Cou	DOE, his wife, (hereinafte d Lane, Abington, Montgom IE JOHN J. DOE AND JAI rantee"); having an addre unty, Commonwealth of Per	r called the hery County, NE J. DOE ss of 123 nnsylvania,									
County SOV SOV Quit Claim Deed			WTTNESSETH, that the said party of the first part, for and in consideration of the sum of One (\$1.00) Dollar lawful money of the United States of America, to them well and truly paid by the said party of the second part, at and before the sealing and delivery of these presents, the receipt whereof is hereby acknowledged, have remised, released and quit-claimed, and by these presents, does remise, release and quit-claim unto the said party of the second part, and to their successors and assigns forever,												
			ALL THAT CERTAIN lot or piece of ground with the buildings and improvements thereon erected or to be erected or to be erected, situate in the Forty-First Ward of the City of Philadelphia, described according to a Plan and Survey made by Howard LeQuin, Surveyor and Regulator of the First District, dated July 20, 1956 as follows, viz:												
	: = a6		BEGINNING a	the corner formed by the in	tersection of the Northwest	erly side of									
Different Automation			Colline Coul, 1992 Av.												
< Previous		Next >	Close	Print All Docs	Print Current Doc	E-Mail Docs									
					E-Mail Recipient	A									

The Print Tab

The purpose of the Print tab, shown below, is to create the trust documents (and/or print them and/or view them on-screen).

John J. Doe and Jane J. Doe - Print Trust Documents	_ 🗆 🗙
👬 Client Info 🦃 Children 🎁 Beneficiaries 🌭 Trustees 🦥 Pour Over Will 🗎 PO 🕂 POA (Health Care) ≪ Agent Summary 🖙 Directives 🚰 Deeds 🗊 Assets 🗯 Photo	A (Assets)
Profile Info	
Witness 1 USAG Rep (for Receipt of Delivery letter)	- @
Witness 2 USAG Phone Number	
Delivery Date	î
Specify Delivery Date 8 / 8 / 2004 C Leave Blank in Doc	
Select Item to Print	25 V.W
O Pre-Approval Docs O Labels	Start #
Select Action	
Save Only Grint to Print to Printer O View On-Screen	to:
Update Contact History	

🙀 Print Preview					_ 🗆 🗙
Revocable Living Trust	[· · ː · · · · · · · · · · · · ·	<u> 3</u> <u>.</u>	• 4 • • • • • • • • • •	· · · i · · · 6 ·
POA-Assets (Client)			LIVING TRUST		
۵		I	nade as of August 9, 2	2004	
POA-HC (Client)			by		
۵			John J. Doe		
Living Will (Client)			and		
			Jane J. Doe		-
LWAT (Client			Trusto	rs	*
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The Activity Calendar Screen

Activity Calendar (Monthly View)

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The Extended View Activity Calendar Screen

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