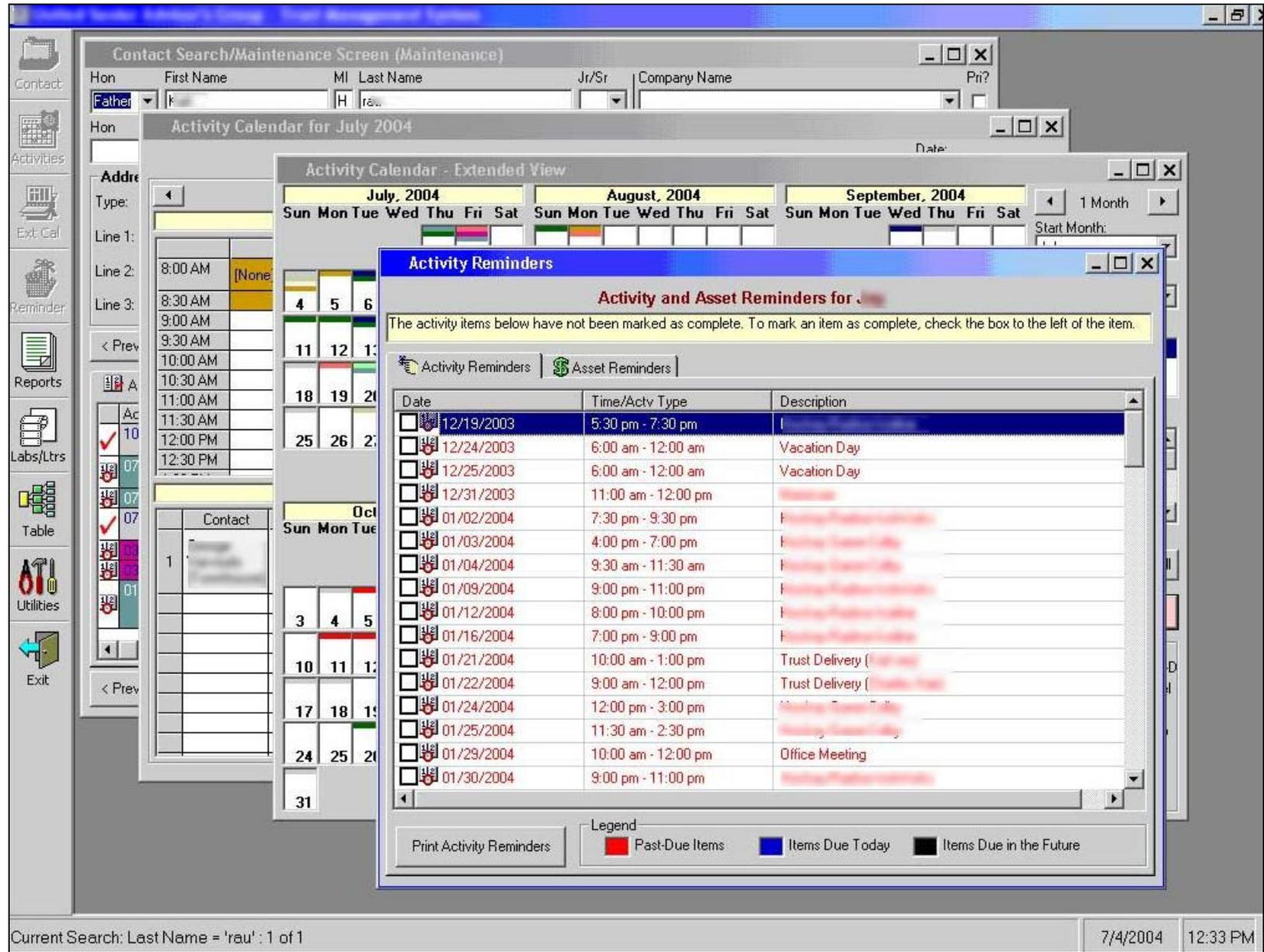


Controlling which Screens are Displayed at Startup

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:



Contact Search/Maintenance Screen in "Maintenance" mode.

[Contact Search/Maintenance Screen (Maintenance)]


Contact

Hon	First Name	MI	Last Name	Jr/Sr	Company Name	Pri?
Mr.	John	J	Doe		Test Seminar	<input type="checkbox"/>
Hon	Spouse First Name	MI	Spouse Last Name	Jr/Sr	Title	
Mrs.	Jane	J	Doe			


Activities


Ext Cal

Address

Type: Home 1 of 4 addresses Zip Cd: Std? 19001 -

Line 1: 123 Mockingbird Lane City: Abington St: PA

Line 2: County: Montgomery

Line 3: Country: USA Def?

Phone Numbers/Email

Type	Std?	Phone #/Email/URL	Ext	Def?
Home	<input checked="" type="checkbox"/>	(610) 123 - 4556		<input type="radio"/>
BUSINES	<input checked="" type="checkbox"/>	(215) 323 - 4242		<input type="radio"/>
Cell	<input checked="" type="checkbox"/>	(610) 902 - 0203		<input type="radio"/>


Reminder


Reports

< Prev
Add Addr
Del Addr
Deed Info
View List
Cancel
Next >

< Prev 3
Phones 1 to 3
Next 3 >


Labs/Ltrs


Table

Activities
 Contact History
 Notes
 Groups
 Trust Info

Actv Date	Description	Users	Re


Utilities


Exit

< Prev
Save
Delete
Add New
Add Sim
Bus Card
Cancel
Return to Search
Quick Letter
Print
Go To Trust
Next >


Add


Upd

< Prev
Save
Delete
Add New
Add Sim
Bus Card
Cancel
Return to Search
Quick Letter
Print
Go To Trust
Next >


Del


Stat

< Prev
Save
Delete
Add New
Add Sim
Bus Card
Cancel
Return to Search
Quick Letter
Print
Go To Trust
Next >

Current Search: Group = "Group" 124 of 568

7/19/2004 10:21 PM

The Add/Update Deed Information Screen

Add/Update Deed Information

DEED Add/Update Deed Information

Addr Type:	Home	Zip Cd:	19001		
Addr Line 1:	123 Mockingbird Lane	City:	Abington	St:	PA
Addr Line 2:		County:	Montgomery		
Addr Line 3:		Country:	USA	Def?	<input checked="" type="checkbox"/>

School District:	Bradford	Parcel Nbr:	ABC-1234		
Assessed Value:	\$180,000.00	CLRF:	1.30	Fair Mkt Val:	\$234,000.00
Property Type:	Residential	COT Book #:	1745	COT Page #:	374-A
Deed Rec'd:	01 / 01 / 2004	Recorded:			
Prep Charge:	\$50.00	Fee Paid:	02 / 02 / 2004		

Quit Claim Deed Variable Text:

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 _____ of the City of Philadelphia, described according to a Plan and Survey made by _____, dated July 20, 1956 as follows, viz:

BEGINNING at the corner formed by the intersection of the Northwesterly side of _____ Avenue as shown on the City Plan (one hundred feet wide) but not legally open, with the Northwesterly side of _____ (seventy feet wide) thence extending North thirty-nine degrees fourteen minutes five seconds West along the said Northwesterly side of _____, Eighty-two feet three and seven-eights inches to a point, distant two hundred ninety-two feet four inches Southeastwardly along the same, from the Southeasterly side of _____

Cancel Delete Deed Info Save

The Activities Tab

Contact Search/Maintenance Screen (Maintenance)

Hon	First Name	MI	Last Name	Jr/Sr	Company Name	Pri?
Mr.	John	J	Doe		Test Seminar	
Hon	Spouse First Name	MI	Spouse Last Name	Jr/Sr	Title	
Mrs.	Jane	J	Doe			

Addr T...	Addr Line 1	A	A	City	State	Zip/Postal
Home	123 Mockingbird Lane			Abington	PA	19001
Office	678 Front Street			Philadelphia	PA	19199
Inve...	6738 Marter Ave.			Moorestown	NJ	08057
Church	123 Holy Ave.			Pennsburg	PA	18073

Type	Std?	Phone #/Email/URL	Ext	Def?
Home	<input checked="" type="checkbox"/>	(610) 123 - 4556		<input checked="" type="radio"/>
BUSIN	<input checked="" type="checkbox"/>	(215) 323 - 4242	1234	<input type="radio"/>
Cell	<input checked="" type="checkbox"/>	(610) 902 - 0203		<input type="radio"/>

Phones 1 to 3

Actv Date	Description	Users	R	
08/02/2004	[John Doe (Test Seminar)] Appt (3:30 pm - 5:30 pm); Trust Delivery		0	Add
07/22/2004	[John Doe (Test Seminar)] Appt (1:00 pm - 2:00 pm); Financial Appointment		0	Upd
06/16/2004	[Lester Williams (Test Seminar)] To-Do (Complete); Send thank you letter		0	Del
05/25/2004	[Mary Smith (Test Seminar)] Call (Complete); Confirm Appointment		0	Stat
05/18/2004	[Mary Smith (Test Seminar)] Call (Complete); Call		0	
11/12/2003	[Harvey Jones (Test Seminar)] Appt (10:00 am - 11:00 am); Lead...		0	

Updating an Activity

Activity Maintenance _ □ ×

 **Update Activity**

Activity Details

Set for TMS User(s): 

-
-
-
-
-
-
-
-
-
-
-

Activity Type

Appointment Call To Do Creeping

Description: Trust Delivery

Activity Date: 8 / 2 /2004 Appointment Time: 3:30 PM

Appointment Duration: 2 Hours Reminder Start Date: 7 /22/2004

Update Contact History

Status: Complete Incomplete

Notes: Take Route 123 and get off at exit 456.

Recurring Item Details

Recurring Item

End Date

Interval: Daily Weekly Monthly

Weekly Item Occurs:

Every 1 week(s) on:

Sunday Thursday

Monday Friday

Tuesday Saturday

Wednesday

Contact

John Doe (Test Seminar) Find Contact Remove Contact Go To Contact Add New Contact

Save + Exit Save + Add New Activity Delete + Exit Delete + Add New Activity Cancel

The Contact History Tab

Contact Search/Maintenance Screen (Maintenance)

Hon	First Name	MI	Last Name	Jr/Sr	Company Name	Pri?
Mr.	John	J	Doe		Test Seminar	<input type="checkbox"/>
Hon	Spouse First Name	MI	Spouse Last Name	Jr/Sr	Title	
Mrs.	Jane	J	Doe		Mrs. Doe	

Addr T...	Addr Line 1	A	A	City	State	Zip/Postal
	Home 123 Mockingbird Lane			Abington	PA	19001
	Office 678 Front Street			Philadelphia	PA	19199
	Inve... 6738 Marter Ave.			Moorestown	NJ	08057
	Church 123 Holy Ave.			Pennsburg	PA	18073

Phone Numbers/Email					
Type	Std?	Phone #/Email/URL	Ext	Def?	
Home	<input checked="" type="checkbox"/>	(610) 123 - 4556		<input checked="" type="radio"/>	<input type="checkbox"/>
BUSIN	<input checked="" type="checkbox"/>	(215) 323 - 4242	1234	<input type="radio"/>	<input checked="" type="checkbox"/>
Cell	<input checked="" type="checkbox"/>	(610) 902 - 0203		<input type="radio"/>	<input checked="" type="checkbox"/>

Add Address Edit Address Delete Address Deed Info < Prev 3 Phones 1 to 3 Next 3 >

Activities Contact History Notes Groups Trust Info

Contact Date	Notes	Trust Event	
8/2/2004	[John Doe (Test Seminar)] Date Delivered	Date Delivered	Add
7/26/2004	[John Doe (Test Seminar)] Date Printed	Date Printed	Upd
7/19/2004	[John Doe (Test Seminar)] Pre-Approval Sent	Pre-Approval Se	
6/8/2004	[Lester Williams (Test Seminar)] Sent app. contract and check #1234 for \$500.		Del
11/11/2003	[Harvey Jones (Test Seminar)] Directions -Take Route 123 to Exit 45. Make left at light. Continue to Oak St. Make right on Oak. Proceed approx. 1 mile and make left on Chestnut. Blue house on		

Std Resp

< Prev Save Delete Add New Add Sim Bus Card Cancel Return to Search Quick Letter Print Go To Trust 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.

The Client Info Tab

John J. Doe and Jane J. Doe - Client Info

Agent Summary | Directives | Deeds | Assets | Photo | Print
Client Info | Children | Beneficiaries | Trustees | Pour Over Will | POA (Assets) | POA (Health Care)

Contact Info

Contact Name:	Mr. John J. Doe
Spouse Name:	Mrs. Jane J. Doe
Address (Line 1):	123 Mockingbird Lane
City/State/Zip:	Abington, PA 19001
County:	Montgomery
Phone Number:	(610) 123-4556

Trust Type

Joint
 Individual

Client Personal Info

Mr/Mrs/Ms: Mr. | First Name: John | MI: J | Last Name: Doe | Jr/Sr: | Social Security Nbr: 111 - 11 - 1111
DOB: 01 / 01 / 1920 | M/F: M | Mar St: M | Physician: Duffy, Scott S.

Spouse Personal Info

Mrs/Ms: Mrs. | First Name: Jane | MI: J | Last Name: Doe | Jr/Sr: | Social Security Nbr: 222 - 22 - 2222
DOB: 02 / 01 / 1920 | Ann Date: 01 / 03 / 1945 | Physician: Smith, Joseph

Widowed Clients Only

Deceased Spouse Full Name: | Date of Death: / /

Changes will be saved automatically when you leave this tab unless you press the "Cancel Update" button.

The Children Tab

John J. Doe and Jane J. Doe - Children (and Other Agents)

Select a child/agent from the list below to Update or Delete. To add a new child/agent, use the Add button.

Hon	First Name	MI	Last Name	Suff	Address	City	St	Zip	County	P
Mr.	Scott	C	Doe		1234 Mountain View Drive	Danielsville	PA	18038	Northam...	(6
Ms.	Carole	M	Doe		987 State Street	Willingboro	NJ	08046	Burlington	(7
Mr.	Larry	F	Doe		5678 Barbara Lane	Willingboro	NJ	08046	Burlington	(3
Ms.	Sally	A	Doe		789 E. 11th Street	Northampton	PA	18067	Northam...	(E

Current Record

Mr/Ms:
 First Name:
 MI:
 Last Name:
 Jr/Sr:

Address:

Zip Code:
 City:
 State:
 County:
 Telephone Number:

Date of Birth: / /
 Social Security Nbr: - -
 M/F:
 Child of:
 Client to Agent:
 Agent to Client:

The Beneficiaries Tab

John J. Doe and Jane J. Doe - Beneficiaries

POA (Health Care) | Agent Summary | Directives | Deeds | Assets | Photo | Print

Client Info | Children | **Beneficiaries** | Trustees | Pour Over Will | POA (Assets)

Available Agents:

- 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:

1st	<input type="text"/>	<input type="button" value="↶"/>	<input type="text"/>
2nd	<input type="text"/>	<input type="button" value="↶"/>	<input type="text"/>
3rd	<input type="text"/>	<input type="button" value="↶"/>	<input type="text"/>
4th	<input type="text"/>	<input type="button" value="↶"/>	<input type="text"/>

< Prev 4 Next 4 >

Changes will be saved automatically when you leave this tab unless you press the "Cancel Update" button.

Cancel Update

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.

John J. Doe and Jane J. Doe - Agent Summary

Client Info | Children | Beneficiaries | Trustees | Pour Over Will | POA (Assets)

POA (Health Care) | Agent Summary | Directives | Deeds | Assets | Photo | Print

	CLIENT	SPOUSE
Children	Larry F. Doe (DOB = 3/1/1955) Scott C. Doe (DOB = 4/1/1960) Carole M. Doe (DOB = 5/1/1962)	Larry F. Doe (DOB = 3/1/1955) Scott C. Doe (DOB = 4/1/1960) Carole M. Doe (DOB = 5/1/1962)
Other Agents		
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	
POW Executors	1. Jane J. Doe 2. Larry F. Doe 2. Scott C. Doe	1. John J. Doe 2. Larry F. Doe 2. Scott C. Doe
Durable POAs for Assets	1. Jane J. Doe 2. Larry F. Doe 3. Scott C. Doe	1. John J. Doe 2. Carole M. Doe 3. Larry F. Doe
Durable POAs for Health Care	1. Jane J. Doe 2. Larry F. Doe 2. Scott C. Doe	1. John J. Doe 2. Larry F. Doe 2. Scott C. 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

In the event any of my named Beneficiaries should predecease me, all of that person's share of the Trust Estate is to 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.

THIRD

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. | Cancel Update

The Deeds Tab

John J. Doe and Jane J. Doe - Deeds [minimize] [maximize] [close]

Client Info | Children | Beneficiaries | Trustees | Pour Over Will | PDA (Assets)

+ PDA (Health Care) | Agent Summary | Directives | **Deeds** | Assets | Photo | Print

Quit Claim Deed Date

 Specify Quit Claim Deed Date
8 / 5 / 2004

Leave Blank in Doc

Select Action

 Print to Printer

 Print to Screen (Print Preview)

 Save Only

Go

Print Preview

Quit Claim Deed

State SOV

Quit Claim Deed

State SOV

County SOV

Quit Claim Deed

QUIT CLAIM DEED

THIS INDENTURE made the 5th day of August, 2004.

BETWEEN JOHN J. DOE and JANE J. DOE, his wife, (hereinafter called the "Grantor") having an address of 123 Mockingbird Lane, Abington, Montgomery County, Commonwealth of Pennsylvania, 19001 and THE JOHN J. DOE AND JANE J. DOE LIVING TRUST (hereinafter called the "Grantee"); having an address of 123 Mockingbird Lane, Abington, Montgomery County, Commonwealth of Pennsylvania, 19001.

WITNESSETH, 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:

BEGINNING at the corner formed by the intersection of the Northwesterly side of

< Previous

Next >

Close

Print All Docs

Print Current Doc

E-Mail Docs

E-Mail Recipient:

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 | POA (Assets)
+ POA (Health Care) | Agent Summary | Directives | Deeds | Assets | Photo | Print

Profile Info

Witness 1: [Dropdown] [Photo]
Witness 2: [Dropdown] [Photo]
USAG Rep (for Receipt of Delivery letter): [Dropdown] [Photo]
USAG Phone Number: (610) 688 - 1555

Delivery Date

Specify Delivery Date: 8 / 8 / 2004
 Leave Blank in Doc

Select Item to Print

Pre-Approval Docs | Full Trust | Labels | Start #: 1

Select Action

Save Only | Print to Printer | View On-Screen | E-Mail to: [Text Box]

Update Contact History

Go

Revocable Living Trust

Memorandum of Trust

POA-Assets (Client)

POA-HC (Client)

Living Will (Client)

LWAT (Client)

LIVING TRUST

made as of August 9, 2004

by

John J. Doe

and

Jane J. Doe

Trustors

< Previous

Next >

Close

Print All Docs

Print Current Doc

E-Mail Docs

E-Mail Recipient:

The Activity Calendar Screen

Activity Calendar (Monthly View)

Activity Calendar for July 2004

Jay

July 2004

Date: 7 /20/2004

View: Daily Weekly Monthly

Show: Appointments Phone Calls To-Dos

User(s):

Check All Clear All

Apply User Change

Print

Legend:

- Sem-Cl (Blue)
- Sem-C (Red)
- P-Del (Magenta)
- Finc (Cyan)
- Lead (Light Green)
- Other (Orange)
- To-Do (Light Yellow)
- Sem-D (Yellow)
- T-Del (Teal)
- Appt (Pink)
- Follw (Light Yellow)
- Pers (Dark Green)
- Call (White)
- AMD (Grey)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 8:00 am - 9:00 a 10:00 am - 11:0 2:00 pm - 5:00 p	2 8:00 am - 1:00 p 11:00 am - 12:0 2:00 pm - 3:00 p	3
4 Independence 8:00 am - 9:00 a	5 8:00 am - 9:00 a	6 8:00 am - 9:00 a 10:30 am - 11:3	7 8:00 am - 9:00 a 10:00 am - 1:00 6:30 pm - 7:30 p	8 8:00 am - 9:00 9:30 am - 12 10:00 am - 1	9 8:00 am - 9:00 a 8:00 am - 8:00 p 10:00 am - 11:0	10 8:00 am - 8:00 p 8:00 am - 9:00 a
11 8:00 am - 9:00 a 8:00 am - 8:00 p	12 8:00 am - 9:00 a	13 8:00 am - 9:00 a 9:30 am - 11:00 1:00 pm - 2:00 p	14 8:00 am - 9:00 9:00 am - 10 10:00 am - 1	15 8:00 am - 9:00 a 9:00 am - 10:00 12:30 pm - 1:30	16 8:00 am - 9:00 a	17
18	19 10:00 am - 11:0 1:00 pm - 2:00 p	20 10:00 am - 1:00 3:00 pm - 4:00 p 4:00 pm - 5:00 p	21 10:00 am - 11:0 4:00 pm - 7:00 p	22 11:00 am - 2:00 1:00 pm - 2:00 p	23	24
25	26 6:30 pm - 7:30 p	27	28 8:00 am - 8:00 p	29 8:00 am - 8:00 p 8:00 am - 8:00 p	30 8:00 am - 8:00 p	31 8:00 am - 8:00 p

The Extended View Activity Calendar Screen

Activity Calendar - Extended View

May, 2004							June, 2004							July, 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1			1	2	3	4	5					1	2	3
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24
23	24	25	26	27	28	29	27	28	29	30	25	26	27	28	29	30	31			
30	31																			
August, 2004							September, 2004							October, 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7				1	2	3	4						1	2
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23
29	30	31					26	27	28	29	30	24	25	26	27	28	29	30		
													31							

◀ 1 Month ▶

Start Month:

Start Year:

Show:

Appointments

Phone Calls

To-Dos

User(s):

User 1

User 2

User 3

User 4

User 5

User 6

Check All Clear All

Reset

Legend

 Sem-CI	 Sem-D
 Sem-C	 T-Del
 P-Del	 Appt
 Finc	 Follow
 Lead	 Pers
 Other	 Call
 To-Do	 AMD