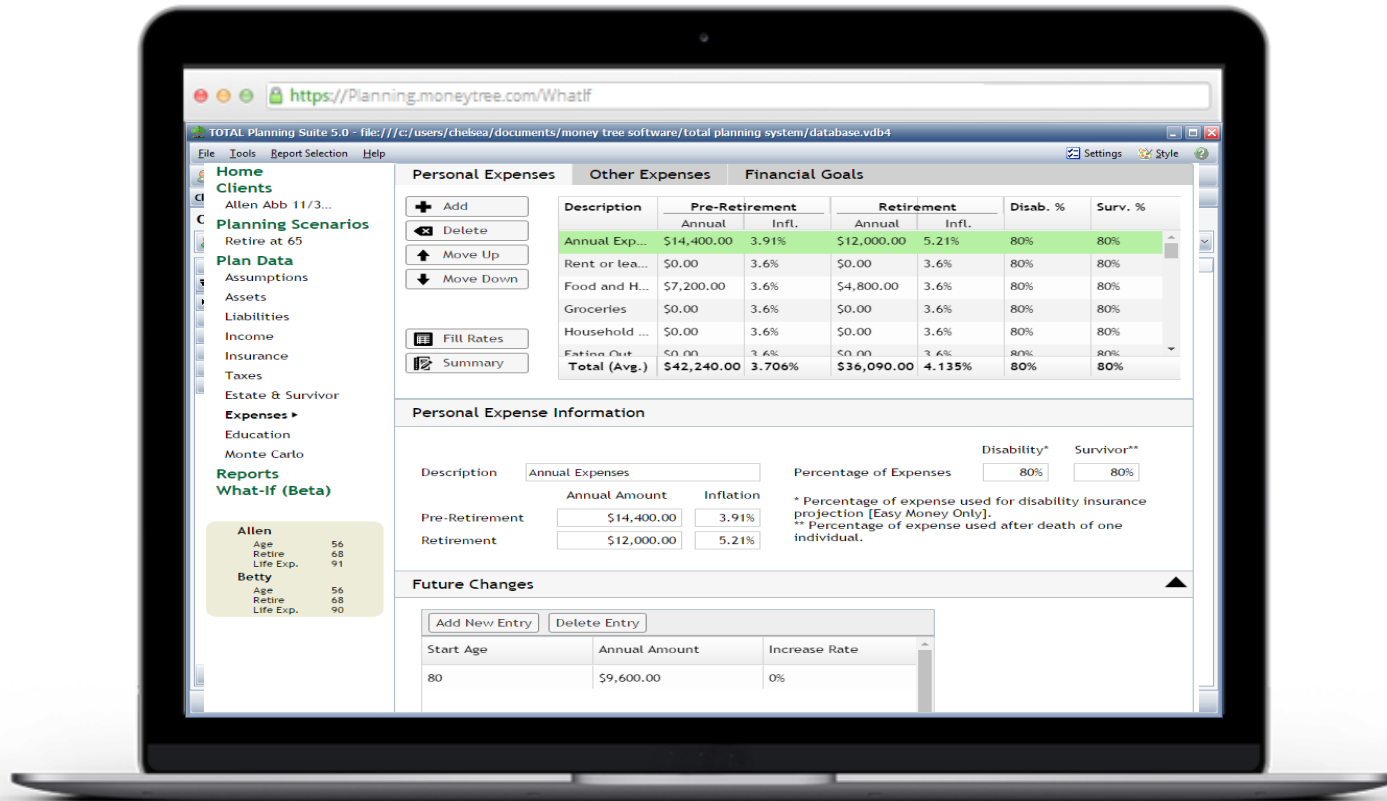


Entering Contact Data Introduction



Main Menu: File

All contact functions are available under the File menu.

Use Export to create a contact file outside of the program, allowing you to move the file or import it into another Money Tree Software program.

Use the Open/Change Database to switch between databases or to add a new or empty database.

The screenshot shows the TOTAL Planning Suite 5.0 interface. The File menu is open, displaying options such as Show Client List, New Client, Open Client, Copy Client, Delete Client, Import Client, Export Client (highlighted), Import/Export Wizard, Import TPS 3.x Database, Create Scenario, Open Scenario, Copy Scenario, Delete Scenario, Open/Change Database (highlighted), and Exit TOTAL Planning Suite. Below the menu, the Asset Details window is visible, showing a table of assets and a detailed view for 'ABC Partners'.

Description	Group	Class	Type
ABC Partners	Partnership (Energy)	Growth	Equity/Other
Allens PS	Savings Accounts	Income	Retirement Plan
Allens Roth	Savings Accounts	Income	Retirement Plan
Allen's Roth 401K	Savings Accounts	Growth	Retirement Plan
Bettys 401k	Mutual Funds (Stocks)	Growth	Retirement Plan
Bettys Roth	Savings Accounts	Income	Retirement Plan
Betty's Roth 401K	Stocks (International)	Growth	Retirement Plan
Boeing Pension	Annuity (Fixed)	Income	Tax-Free
BofA checking	Checking Accounts	Reserves	Taxable

The detailed view for 'ABC Partners' shows the following information:

- Account: (None)
- Group: Partnership (Energy)
- Liquidity: Non-Liquid
- Class: Growth
- Type: Equity/Other
- Retirement Plan: (None)
- Account Owner: Joint
- Beneficiary: (None)

Asset Values

# Shares or Units	55.0000
\$ Price Share / Unit	\$19,14000
Value	1,053
Cost Basis	\$27,500

Options: Subject to AMT Tax? Check if used for retirement

Memo

Allen Age: 61 Retire Age: 65 Life Expectancy: 91 Phone: 555-123-4567 Betty Age: 62 Retire Age: 65 Life E

Contact List

Once a database is opened, the clients in that database will be displayed in the Client List.

To open a client's information card, either select that client and select "Open Client", or double click on them. Use the same techniques to open a client's scenario: double click to open it or highlight it and click on "Open Scenario".

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	1/31/2017	
Anderson	Stanley				1/31/2017	
Boop	Bob				1/19/2017	
Example	Larry				1/31/2017	
Sam 12/15/2016	Bob				12/29/2016	
Test	SingleClient				1/9/2017	

6 Clients

Scenario List and Management

The screenshot displays the TOTAL Planning Suite 5.0 interface. The main window title is "TOTAL Planning Suite 5.0 - file:///c:/users/chelsea/documents/money tree software/total planning system/database.vdb4". The menu bar includes "File", "Tools", "Report Selection", and "Help". The toolbar contains "New Client", "Open Client", and "Client Tasks". The "Client List" section features a "Clients" table with columns for Last Name, First Name, Home Phone, Cell Phone, Work Phone, Last Updated, and Email Address. The table lists several clients, with "Abbett" selected. The "Scenarios" panel on the right shows two scenarios: "Imported Retire at 65" and "Imported Real Estate".

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	1/31/2017	
Anderson	Stanley				1/31/2017	
Boop	Bob				1/19/2017	
Example	Larry				1/31/2017	
Sam 12/15/2016	Bob				12/29/2016	
Test	SingleClient				1/9/2017	

6 Clients

When you save scenarios of a contact they will be shown in the Scenario list on the right hand panel. This panel allows you to view historical plans for your clients and review them if needed.

You can create, copy, or delete a scenario using the Scenario Tasks button located just above the scenario list.

Once a scenario has been deleted there is no way to retrieve it.

Finding a Contact

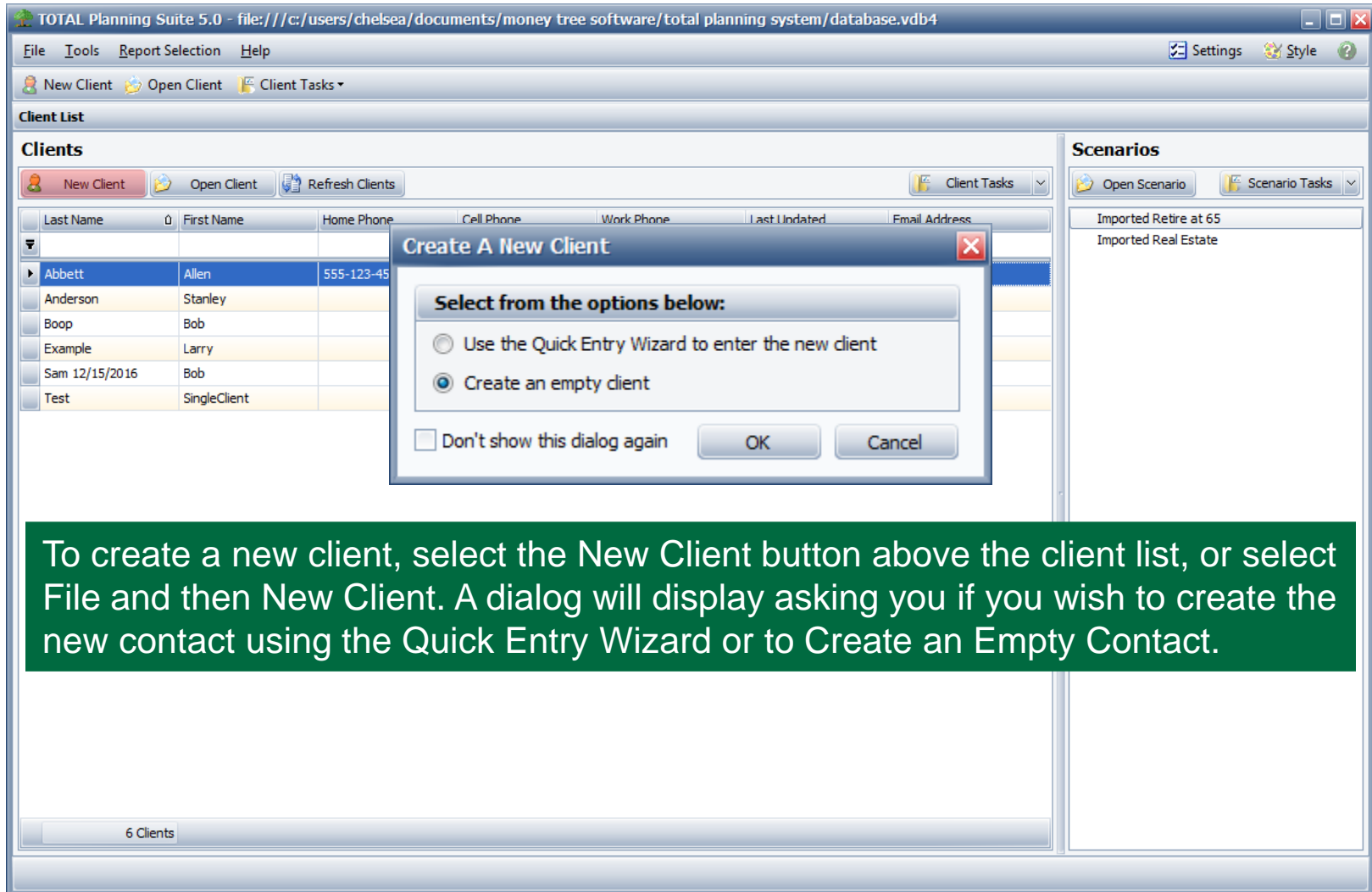
The screenshot displays the TOTAL Planning Suite 5.0 application window. The title bar shows the file path: file:///c:/users/chelsea/documents/money tree software/total planning system/database.vdb4. The menu bar includes File, Tools, Report Selection, and Help. Below the menu bar, there are buttons for New Client, Open Client, and Client Tasks. The main area is divided into two panes: 'Clients' and 'Scenarios'. The 'Clients' pane contains a table with columns for Last Name, First Name, Home Phone, Cell Phone, Work Phone, Last Updated, and Email Address. The 'Scenarios' pane shows two entries: 'Imported Retire at 65' and 'Imported Real Estate'. A green text box is overlaid on the interface, providing instructions on how to search for a contact in the database.

To find a contact in the database enter their information into the empty search fields, located just above the client list. You may enter information into any field to have the program search the database for that client. Some examples of entries would be the client's first name, last name, or email address.

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	1/31/2017	
Anderson	Stanley				1/31/2017	
Boop	Bob				1/19/2017	
Example	Larry				1/31/2017	
Sam 12/15/2016	Bob				12/29/2016	
Test	SingleClient				1/9/2017	

6 Clients

Creating a New Contact



The screenshot shows the TOTAL Planning Suite 5.0 interface. The main window displays a 'Client List' table with columns for Last Name, First Name, Home Phone, Cell Phone, Work Phone, Last Updated, and Email Address. The table contains several rows, including 'Abbett', 'Anderson', 'Boop', 'Example', 'Sam 12/15/2016', and 'Test'. A 'Create A New Client' dialog box is open in the foreground, prompting the user to select from two options: 'Use the Quick Entry Wizard to enter the new client' and 'Create an empty client'. The 'Create an empty client' option is selected. The dialog box also includes 'OK' and 'Cancel' buttons, and a checkbox for 'Don't show this dialog again'.

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-45				
Anderson	Stanley					
Boop	Bob					
Example	Larry					
Sam 12/15/2016	Bob					
Test	SingleClient					

Create A New Client

Select from the options below:

- Use the Quick Entry Wizard to enter the new client
- Create an empty client

Don't show this dialog again

OK Cancel

To create a new client, select the New Client button above the client list, or select File and then New Client. A dialog will display asking you if you wish to create the new contact using the Quick Entry Wizard or to Create an Empty Contact.

Creating a New Contact: Quick Entry Wizard

The screenshot shows a software window titled "TOTAL Planning Suite Questionnaire" with a close button in the top right corner. The main heading is "Client Information" with "Previous" and "Next" navigation buttons. Below the heading is a welcome message: "Welcome to the Quick Entry Wizard." The form is divided into sections: "Individual 1" and "Individual 2", each with fields for First Name, Last Name, Birth Date (set to 1/31/2017), and Retirement Age (set to 0). There is a "Married" checkbox. The "Address" section includes fields for Home Address, City, State, Zip, Home Phone, Work Phone, Mobile Phone, and Email. At the bottom, it indicates "Step 1 of 13", a "Jump to:" dropdown menu set to "Client Information", and buttons for "Open Blank Questionnaire Document", "Cancel", "Previous", "Next", and "Finish".

The Quick Entry Wizard will guide you through a one time 13 step wizard to input the client's essential information. This will include sources of income, assets, liabilities, and personal expenses.

Creating a New Contact: Create an Empty Contact

The screenshot displays the 'TOTAL Planning Suite 5.0' application window. The title bar shows the file path: 'file:///c:/users/chelsea/documents/money tree software/total planning system/database.vdb4'. The menu bar includes 'File', 'Tools', 'Report Selection', and 'Help'. The toolbar contains buttons for 'Open Client List', 'New Scenario', 'Open Scenario', 'Scenario Tasks', 'Easy Money Report', 'Golden Years Report', and 'Express Reports'. The main window is titled 'Client Information' and has tabs for 'Client Information', 'Employment', 'Advisors', and 'Notes'. On the left, a 'Scenarios' sidebar shows 'New Scenario (1/...' with a red highlight. The main content area is divided into several sections: 'Planner' (a dropdown menu), 'Individual 1' and 'Individual 2' (forms for personal details like First, M.I., Last, Birth Date, Gender, and Date Married), 'Address & Phone' (fields for Home Address, City, State, Zip, and phone numbers for both individuals), and 'Account Type' (checkboxes for Active, Business, Client, Other, Personal, and Under Management). An 'Edit Account Types' button is located at the bottom of the Account Type section.

If you select “Create an empty client”, you will skip the Quick Entry Wizard and go directly to the detailed data input. The program will start you on the Client Information tab and will create an empty scenario with the title “New Scenario” and the date the scenario was created.

Contact Information

The screenshot shows a software interface for entering client contact information. At the top, there are tabs for "Client Information", "Employment", "Advisors", and "Notes". Below the tabs is a "Planner" dropdown menu. The main content is divided into several sections:

- Individual 1:** Fields for First, M.I., and Last names; Birth Date (1/31/2017); M.I. (0); Gender; Date Married (12/31/2008); and a checkbox for "Check if married".
- Individual 2:** Fields for First, M.I., and Last names; Birth Date (1/31/2017); M.I. (0); Gender.
- Address & Phone:** Fields for Home Address, City, State (Corvallis, Oregon), and Zip (97330). Below this are fields for Home Phone, Work Phone, Mobile Phone, Fax, Email, and Web Page, each with separate input boxes for Individual 1 and Individual 2.
- Account Type:** A list of checkboxes for "Active", "Business", "Client", "Other", "Personal", and "Under Management". A button labeled "Edit Account Types" is located at the bottom of this section.

Use this section to enter in characteristics of this client. The information in Individual 1 and 2's sections is used throughout the program for calculations and report pages. Address & Phone information will be on the Personal Statistics page within reports, but Account Type will only be for your information and will not be used in the reports.

Employment

The screenshot displays a software interface with four tabs: Client Information, Employment, Advisors, and Notes. The Employment tab is active. It contains two columns, Individual 1 and Individual 2, each with a set of input fields for employment information. The fields for Individual 1 are: Duties/Title, Employer, Work Address, City, State (with a dropdown arrow), Zip, Phone, Fax, and Email. The fields for Individual 2 are: Duties/Title, Employer, Work Address, City, State (with a dropdown arrow), Zip, Phone, Fax, and Email.

The second tab in this section is Employment.

Enter the client and spouse's employment information here. This information will be listed on the Personal Statistics report page.

Advisors

The screenshot shows a software interface with four tabs: Client Information, Employment, Advisors, and Notes. The Advisors tab is active. At the top, there are two buttons: 'Add Advisor' (with a person icon) and 'Delete Advisor' (with a red 'X' icon). Below these is a table with columns for Name, Phone, Email, and Advisor Type. The table is currently empty. Below the table is the 'Advisor Details' section, which contains several input fields: First Name, M.I., Last Name, Company, Address, City, State, Zip, Phone, Mobile Phone, Fax, Email, Web Page, and Advisor Type (a dropdown menu). There is also a button labeled 'Add/Change Advisor Types'.

On the Advisors tab, add the client's advisors – CPA, attorney, insurance, etc.

Information entered here will carry over to the advisor information report page.

Notes

Client Information Employment Advisors Notes

+ Add Note View / Print Log

Who	When	Memo
-----	------	------

Notes tab: Use to record notes for the contact.

Use to document your meetings and conversations with the contact, changes you have made to the entries, and other life events that may have had impact on the plan.

To enter a new note, select the Add Note button on the top left of the section. You also may print the log from here to add to the report for hard copies or archives.

For compliance, notes cannot be deleted.

For compliance and security purposes, notes are not editable.

Entering Contact Data

Thank you for taking the time to review the introduction to Entering Contact Data.

Questions?

Ask Money Tree's Support Team

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