

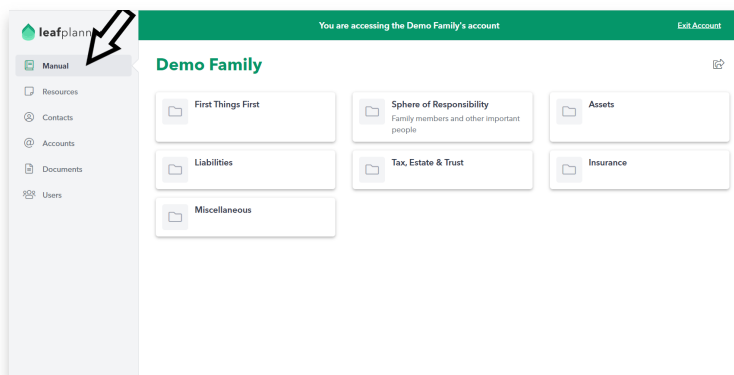
## How-To: Helpful Tips

If you're just getting started, **leafplanner** is a blank canvas for you to paint as you'd like. While we've given you some structure, we understand that it can be a little daunting to get started. We recommend you read a [client case study], our [founders' stories], and our [getting started guide] to help you. Those are all designed to inspire you and to give you ideas of how you might want to use **leafplanner** for your family.

This "How-To" guide is designed to help you understand the nuts and bolts of how **leafplanner** works. You ready? Ok, let's go...

Keep in mind, you can enter different kinds of data from all angles. In other words, for example, you can create a Contact through the Contacts section, you can create a Contact as you are preparing a checklist of important people in the First Things First Section, or you can create a Contact as you're entering your Will or a Trust, etc. You're not limited to any one way - do what's comfortable for you and your workflow.

Keep in mind, the Manual button will always take you "home."

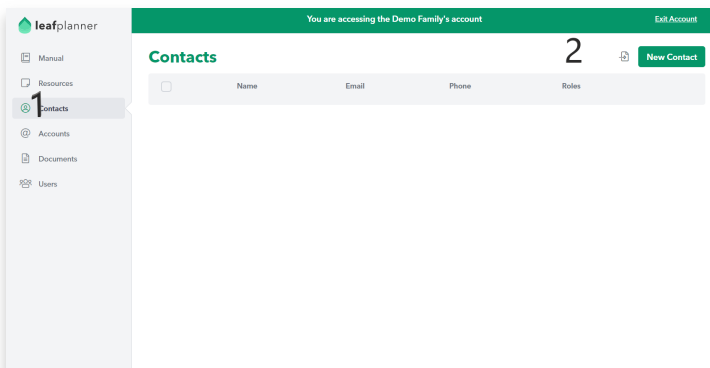


## Creating a Contact

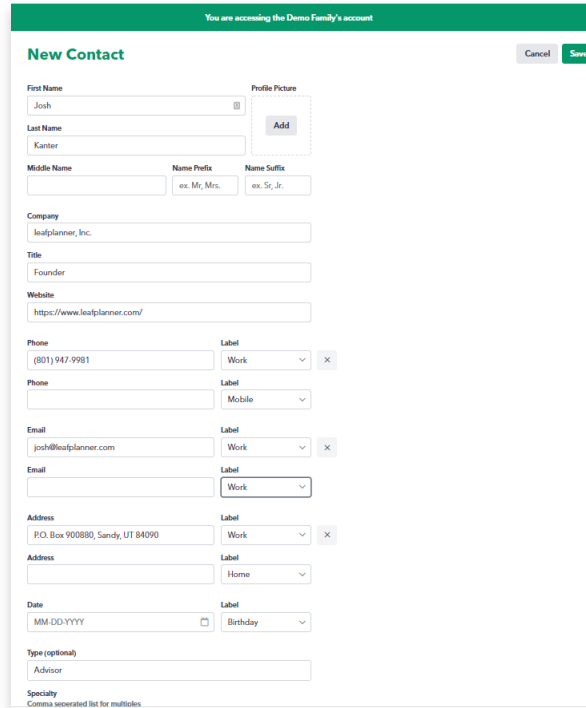
Let's start by entering a Contact, but keep in mind, working with Documents and Accounts works exactly the same way so everything here is about adding and connecting a Contact, but applies in the same way to Documents and Accounts.

First, I'm going to create an Family Wealth Advisor through the Contact section.

- 1 - Click on Contacts in the menu panel on the left
- 2 - Click on New Contact in the upper right



Go ahead and enter the Contact details for the person you want to create. Keep in mind, you can add as many phone numbers, email addresses, physical addresses, and important dates as you'd like. Go ahead, try it. Every time you enter one, another field will appear for you.



**New Contact** Cancel Save

**First Name**  
Josh

**Last Name**  
Kanter

**Profile Picture**  
Add

**Middle Name**  
  
**Name Prefix**  
ex. Mr, Mrs.

**Name Suffix**  
ex. Sr, Jr.

**Company**  
leafplanner, Inc.

**Title**  
Founder

**Website**  
<https://www.leafplanner.com/>

**Phone**  
(801) 947-9981 **Label** Work X

**Phone**  
  
**Label** Mobile

**Email**  
josh@leafplanner.com **Label** Work X

**Email**  
  
**Label** Work

**Address**  
P.O. Box 900880, Sandy, UT 84090 **Label** Work X

**Address**  
  
**Label** Home

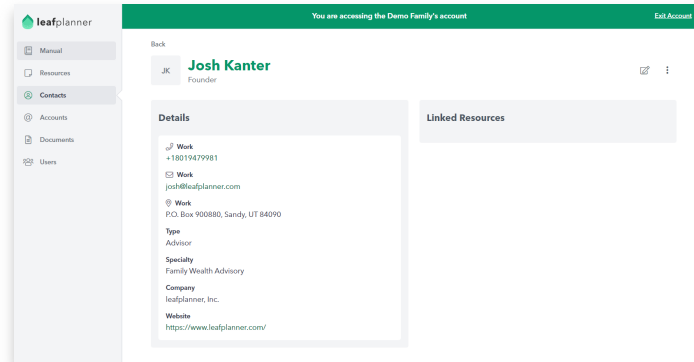
**Date**  
MM-DD-YYYY **Label** Birthday

**Type (optional)**  
Advisor

**Specialty**  
Comma separated list for multiselect

If you have a picture of the Contact, click the "Add" button in the picture field and you'll be able to upload a picture from your computer. (We find it's usually pretty easy to find your Contacts on their websites or on LinkedIn. When you do, just right click on the picture there and choose "save image as" and save the image to your computer.)

Once you save the Contact, it'll look like this:



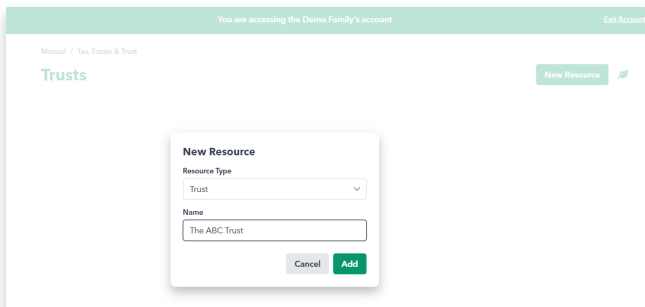
You can edit or delete the Contact from the icons at the top right.

Once the Contact exists, you can connect the Contact, with their specific role, to other Resources throughout your **leaf**plan. But remember, if you haven't created the Contact yet, you can always do it "on the fly" from wherever you are.

## Creating a Trust

Let's create a Trust over in the Tax, Estate & Trust section. Go ahead, head over the Trust section and click on New Resource.

You'll see the system knows that you're entering a trust, so just enter the name and hit Add:



The screenshot shows the leafplanner interface. At the top, a green header bar contains the text "You are accessing the Demo Family's account" and a link "Exit Account". Below the header, a breadcrumb trail reads "Manual / Tax, Estate & Trust". The main heading is "Trusts". In the top right corner, there is a green button labeled "New Resource" with a plus icon. A modal form titled "New Resource" is open in the center. It has a "Resource Type" dropdown menu with "Trust" selected. Below that is a "Name" text input field containing "The ABC Trust". At the bottom of the form are two buttons: "Cancel" and "Add".

Now you'll be asked for various trust details. Keep in mind, while we recommend you include as many details as possible, you don't have to. Or you can come back and do it later. In this case, we've entered some details, as you'll see below.

You are accessing the Demo Family's account

### Add a Trust

Preview

Cancel

Save

Name

The ABC Trust

Description

This was a trust established by ABC for CDE. It represents a gift of love.

Details

Date

01-01-2022

Expected Termination Date

MM-DD-YYYY

Expected Termination Event

CDE's 35th birthday

Grantor Trust Status

Yes

GST Exempt

No

Review Frequency

Annually

Type

Irrevocable

EIN

XX-XXXXXX

Trust Guide

While you can certainly just enter the basics of each trust in this section, we'd encourage you to gather and enter as much data as possible that will help those unfamiliar with trusts to find and understand the information they need.

This would include such basics as the grantor's identity, beneficiaries, trustees, lawyers, advisors, etc. It might also include more complex issues like the trust's tax status and whether the trust is GST exempt.

And you might consider including any memos, letters, or videos explaining the formation and purpose of each trust.

Related Resources

Add Related Resource

Contacts

Add Contact

Documents

Add Document

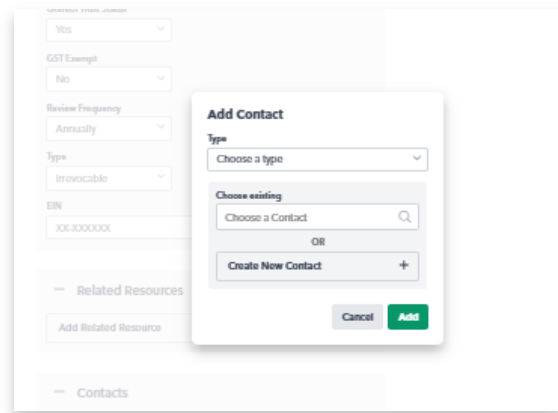
Account

Add Account

Now I can save my Trust or keep working.

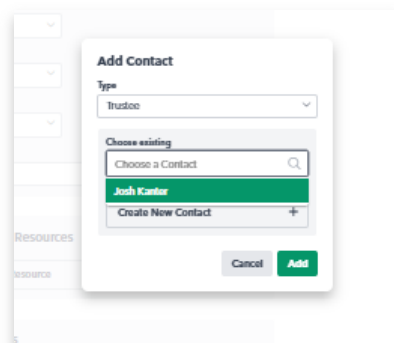
## Adding a Contact to a Trust

Let's say I want to add some Contacts. Here's where things get pretty slick. Click on Add Contact and you'll be given a choice to add a contact or a note. Let's add a contact.



Because we're in the Trust section, when you go to choose a type, **leafplanner** will give you typical choices relating to a Trust. Don't see the role you want? No problem, just choose 'other' (and let us know so we can keep improving the choices throughout the system!).

Now you can choose an existing contact or add a new contact. We'll attach Josh Kanter as the Trustee by choosing existing contact.

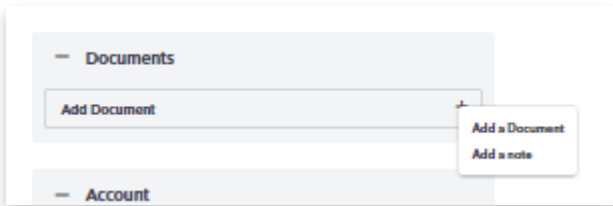


If the person you want to assign isn't yet in the system, just create a new contact from this screen - it'll work just like adding a Contact through the Contacts section.

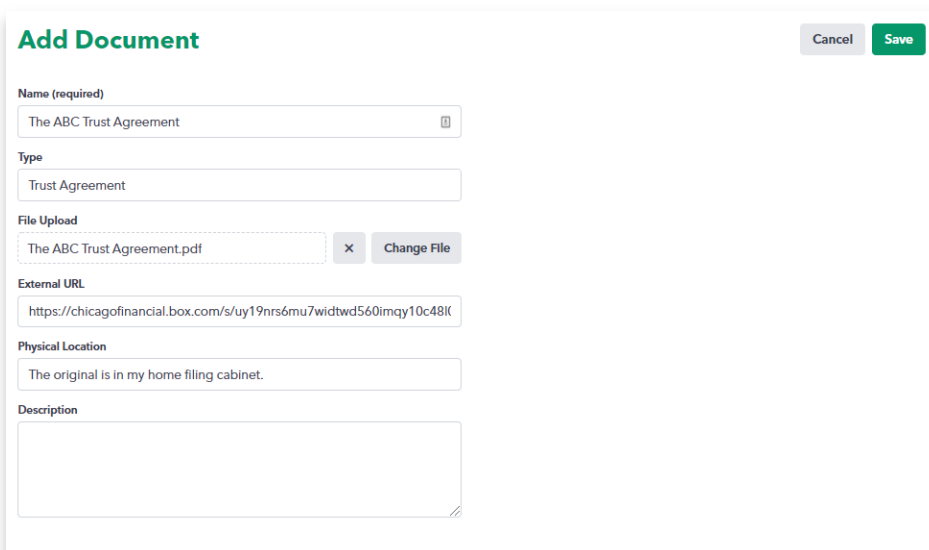
## Adding a Document to a Trust

I can also add a document at this point. Keep in mind, all Contacts, Documents, and Accounts can be an actual Contact, Document or Account, or they can be notes that you can add.

When I go to add a Document to The ABC Trust, it'll look like this:



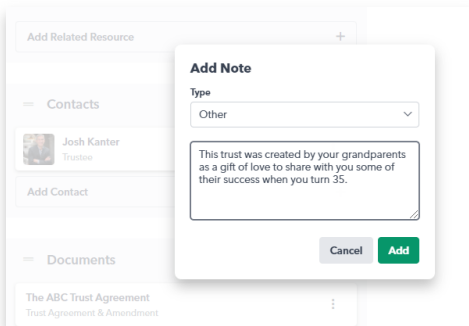
Choose Add a Document. It'll look like what you've seen before - you can choose an existing document if you've already created that document somewhere else, or you can create a new document. Here, we'll create a new document. Notice the third, fourth and fifth boxes. These give you the choice to upload a document, provide an external link (e.g., to BOX, Dropbox, etc.), or to simply note the document's physical location. You can do any or all of these in combination. If you upload a document, the name will be self-polulated. Here I've done all three:

A screenshot of the 'Add Document' form. The form has a title 'Add Document' in green at the top left. At the top right are 'Cancel' and 'Save' buttons. The form contains several input fields: 'Name (required)' with the value 'The ABC Trust Agreement'; 'Type' with the value 'Trust Agreement'; 'File Upload' with a file named 'The ABC Trust Agreement.pdf' and a 'Change File' button; 'External URL' with a long URL; 'Physical Location' with the text 'The original is in my home filing cabinet.'; and a large 'Description' text area at the bottom.



## Adding a Note to a Trust

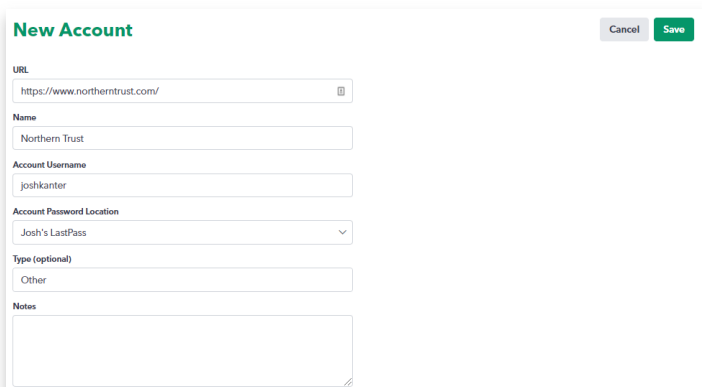
Now, maybe I also want to add a note about the special purpose of this Trust. I can add another Document, using the Note feature, like this:



Whether it's by adding notes or contacts to specific Resources, or other memos or videos of explanation, remember that **leafplanner** is trying to get you to think past the "what and where" to the "how and why." Keep thinking about what you know that someone else might not.

## Adding an Account to a Trust



And just so you get the full experience, we'll also add an account. In this case, a bank account with the password stored in a LastPass account:



Once you save the Trust, it'll look like this:

Manual / Tax, Estate & Trust / Trusts

The ABC Trust




This was a trust established by ABC for CDE. It represents a gift of love.


Details

Date	January 1, 2022	GST Exempt	No	EIN	XX-XXXXXX
Expected Termination Event	CDE's 35th birthday	Review Frequency	Annually		
Grantor Trust Status	Yes	Type	Irrevocable		

Contacts

Josh Kanter

Trustee



Documents

The ABC Trust Agreement

Trust Agreement & Amendment

>


Note

Other

This trust was created by your grandparents as a gift of love to share with you some of their success when you turn...

View full note

Account

Northern Trust

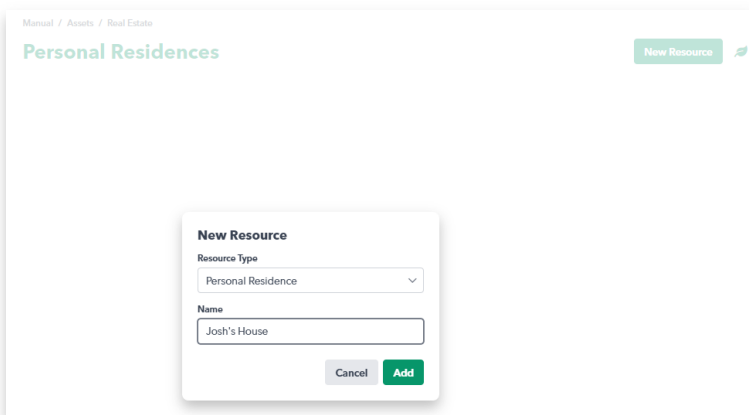
Other

Like always, you can edit or delete the Trust using the icons in the top right.

## The Power of Related Resources

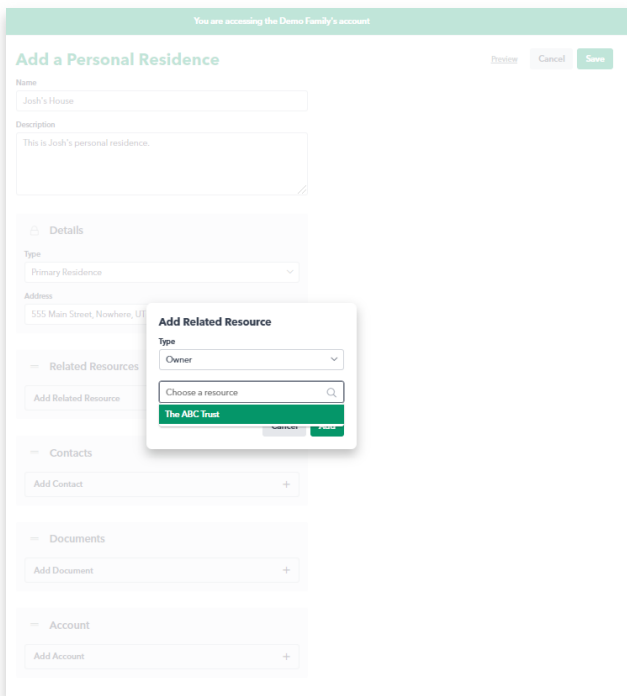
Ok, let's look at the power of Related Resources. This is the way you connect different things, or resources, throughout your **leaf**plan. For example, this is how you might connect a Trust and an Insurance Policy, or a Trust, an Asset, and a Liability, etc.

To see this, let's first go and create a house over in Assets, Real Estate, Personal Residences. Go ahead and Add Resource and enter information about the house:



The screenshot shows the 'Personal Residences' section of the leafplanner interface. At the top left, there is a breadcrumb trail: 'Manual / Assets / Real Estate'. The page title 'Personal Residences' is displayed in green. In the top right corner, there is a green button labeled 'New Resource' with a plus icon. A modal window titled 'New Resource' is open in the center. It contains a 'Resource Type' dropdown menu with 'Personal Residence' selected, and a 'Name' text input field containing 'Josh's House'. At the bottom of the modal are two buttons: 'Cancel' and 'Add'.

Once I add the new resource, I'll be able to fill in typical details and then add a Related Resource - The ABC Trust, which is the owner of the house:



You are accessing the Demo Family's account

### Add a Personal Residence

[Reset](#) [Cancel](#) [Save](#)

**Name**  
Josh's House

**Description**  
This is Josh's personal residence.

**Details**

**Type**  
Primary Residence

**Address**  
555 Main Street, Nowhere, UT

**Related Resources**  
[Add Related Resource](#)

**Contacts**  
[Add Contact](#) +

**Documents**  
[Add Document](#) +

**Account**  
[Add Account](#) +

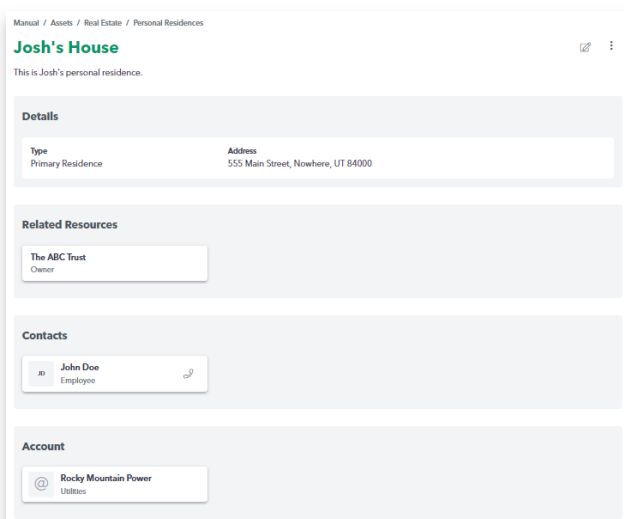
**Add Related Resource**

Type: Owner

Choose a resource

The ABC Trust

You can add people, documents, accounts, or other related resources. Once you save it, it'll look like this:



Manual / Assets / Real Estate / Personal Residences

### Josh's House

This is Josh's personal residence.

**Details**

Type: Primary Residence Address: 555 Main Street, Nowhere, UT 84000

**Related Resources**

The ABC Trust  
Owner

**Contacts**

John Doe  
Employee

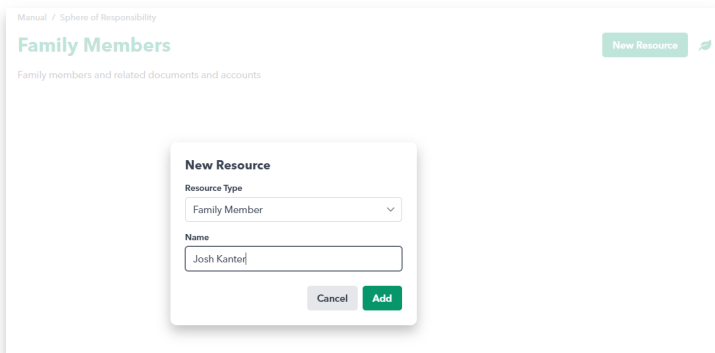
**Account**

Rocky Mountain Power  
Utilities

## Family Members

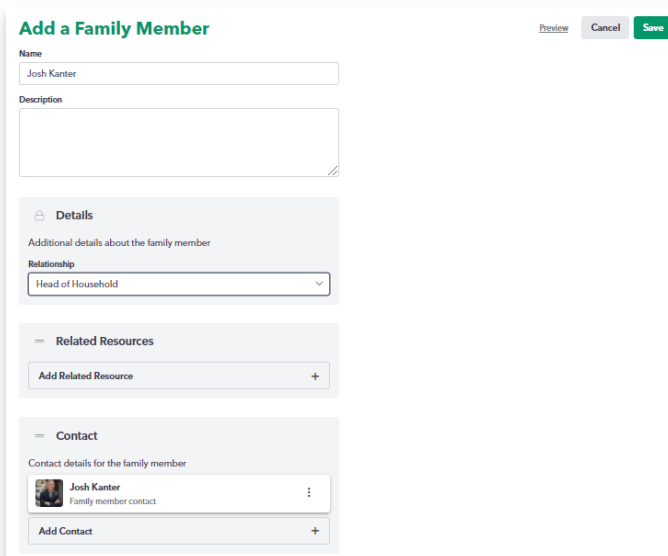
Adding family members is just like adding a Contact. In fact, that's exactly what it is, but **leafplanner** needs to know that they aren't just ordinary Contacts.

Head over to the Sphere of Responsibility and into the Family Members section. Create a New Resource like this:



The screenshot shows the 'Family Members' section of the application. At the top, there's a breadcrumb 'Manual / Sphere of Responsibility' and a 'New Resource' button. Below the section title 'Family Members', there's a subtitle 'Family members and related documents and accounts'. A modal titled 'New Resource' is open, showing a 'Resource Type' dropdown set to 'Family Member' and a 'Name' field containing 'Josh Kanter'. At the bottom of the modal are 'Cancel' and 'Add' buttons.

Now, even though I've been added as a family member, I still need to create myself as a Contact (or choose me as an Existing Contact). In this case, since I'm already in the system, I'll just attach myself to, well, myself! I'll also designate myself as the Head of Household.



The screenshot shows the 'Add a Family Member' form. It has a 'Name' field with 'Josh Kanter' and a 'Description' field. Below these is a 'Details' section with a 'Relationship' dropdown set to 'Head of Household'. There's a 'Related Resources' section with an 'Add Related Resource' button. At the bottom is a 'Contact' section with a 'Contact details for the family member' field showing 'Josh Kanter' as a 'Family member contact' and an 'Add Contact' button. The form has 'Preview', 'Cancel', and 'Save' buttons at the top right.

## Collections

Manual / Assets / Collections

### Josh & Catherine's Art Collection

**Details**

Type: Art

Database: Filemaker database on Josh's computer

The location of the collection database

**Related Resources**

Fine Arts Insurance  
Location

Attaching a fine arts insurance policy as a Related Resource

**Contacts**

Including various contacts – auction houses, art dealers, non-profit organization directors, art advisors, etc.

Helyn Goldenberg  
Auction

Johannah Hutchison  
Advisor

Michael Klein  
Advisor

Tom McCormick  
Advisor

Erica Barrish  
Advisor

Sandra Berlin  
Other

**Documents**

Note  
Other

For any significant works, it's worth contacting Helyn. At Sotheby's, historically, we've received, as a seller, hammer + 4%...

View full note

Including some information about a special relationship with an auction house

