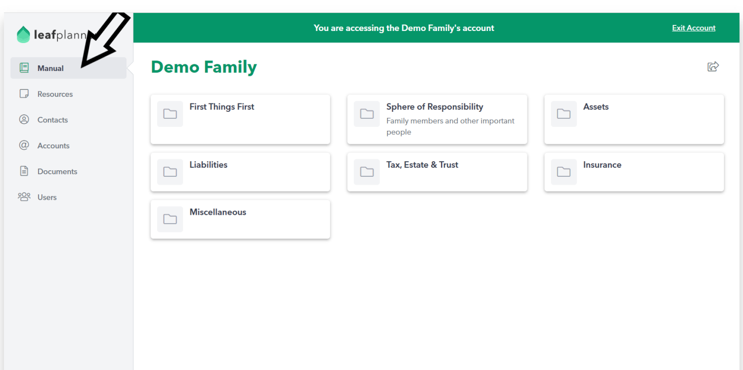
How-To: Helpful Tips

If you're just getting started, **leaf**planner 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 **leaf**planner for your family.

This "How-To" guide is designed to help you understand the nuts and bolts of how **leaf**planner 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."

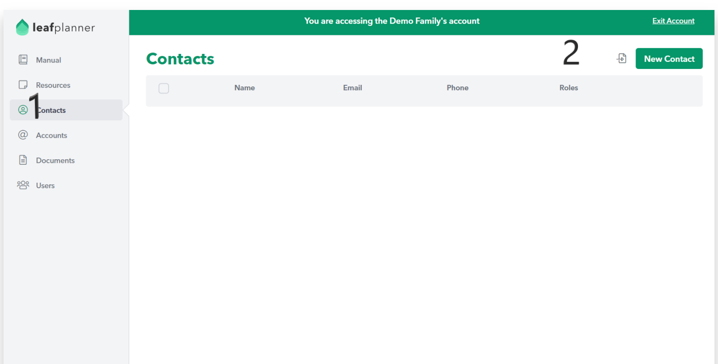


Creating a Contact

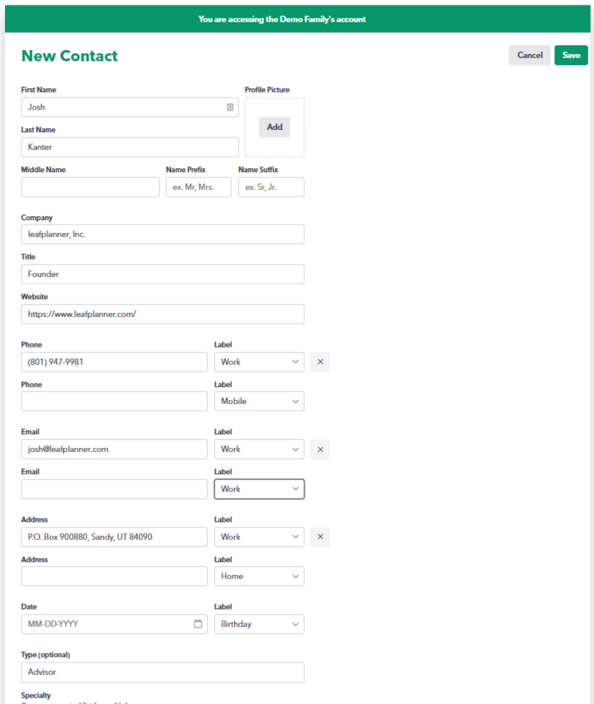
Let's start by entering a Contact, but keep in mind, working with Documents and Accounts works exactly the same way so everything here is about adding and connecting a Contact, but applies in the same way to Documents and Accounts.

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

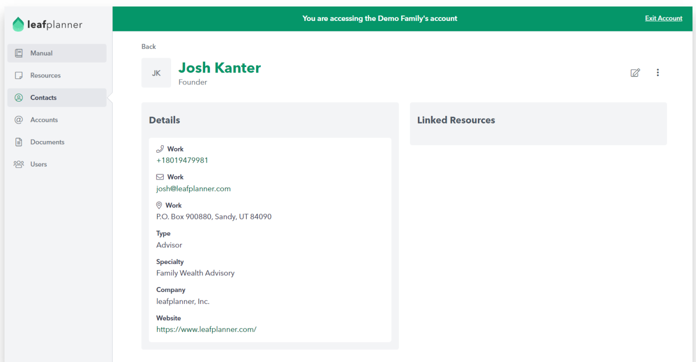


Go ahead and enter the Contact details for the person you want to create. Keep in mind, you can add as many phone numbers, email addresses, physical addresses, and important dates as you'd like. Go ahead, try it. Every time you enter one, another field will appear for you.



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:



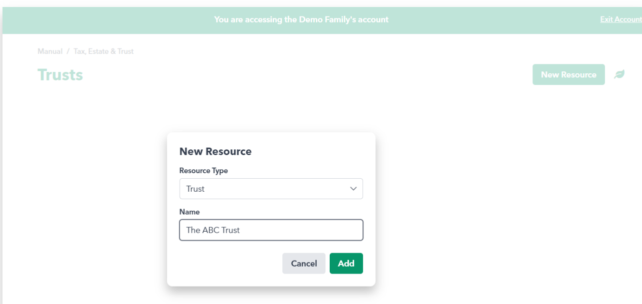
You can edit or delete the Contact from the icons at the top right.

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.

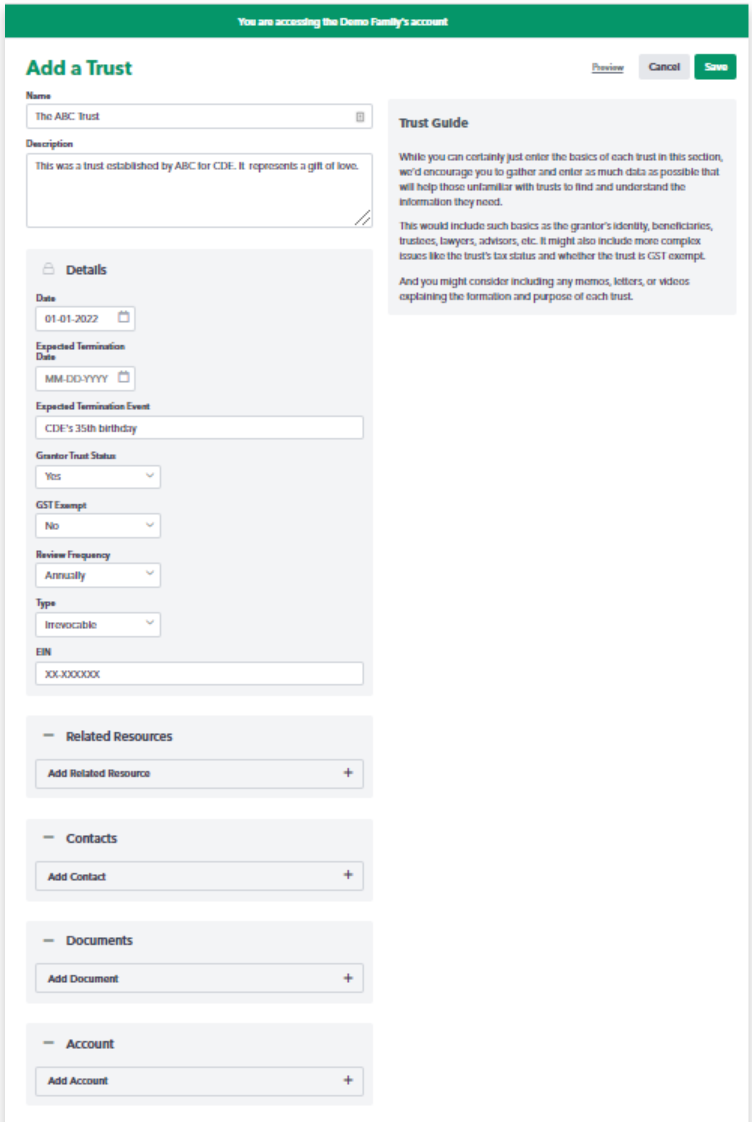
Creating a Trust

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:



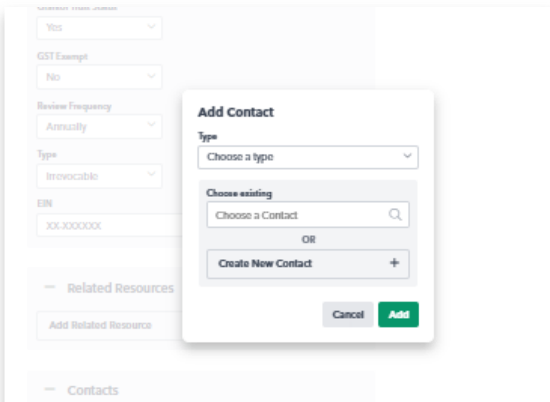
Now you'll be asked for various trust details. Keep in mind, while we recommend you include as many details as possible, you don't have to. Or you can come back and do it later. In this case, we've entered some details, as you'll see below.



Now I can save my Trust or keep working.

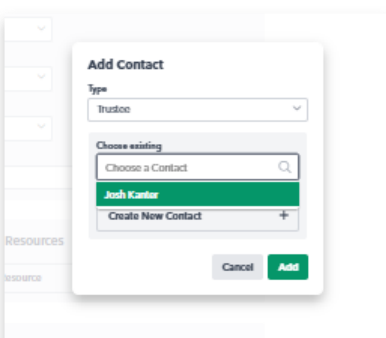
Adding a Contact to a Trust

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, **leaf**planner 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!).

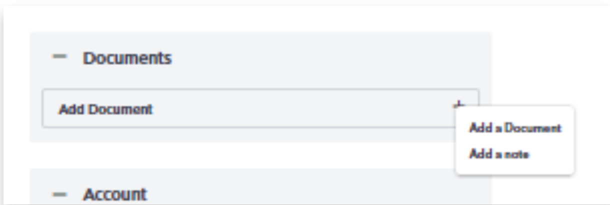
Now you can choose an existing contact or add a new contact. We'll attach Josh Kanter as the Trustee by choosing existing contact.



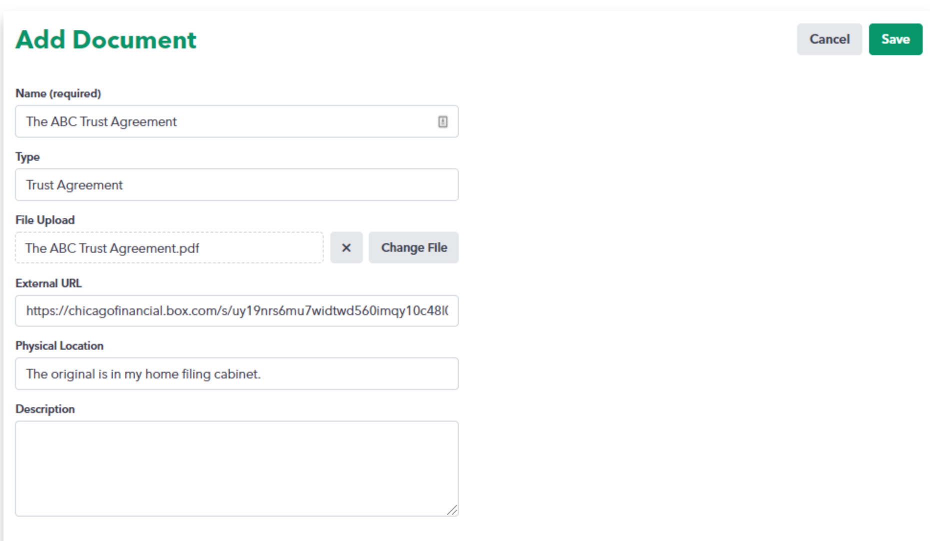
If the person you want to assign isn't yet in the system, just create a new contact from this screen - it'll work just like adding a Contact through the Contacts section.

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:

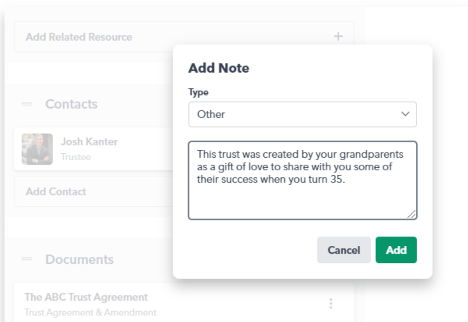


Choose Add a Document. It'll look like what you've seen before - you can choose an existing document if you've already created that document somewhere else, or you can create a new document. Here, we'll create a new document. <u>Notice the third, fourth and fifth boxes</u>. These give you the choice 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:



Adding a Note to a Trust

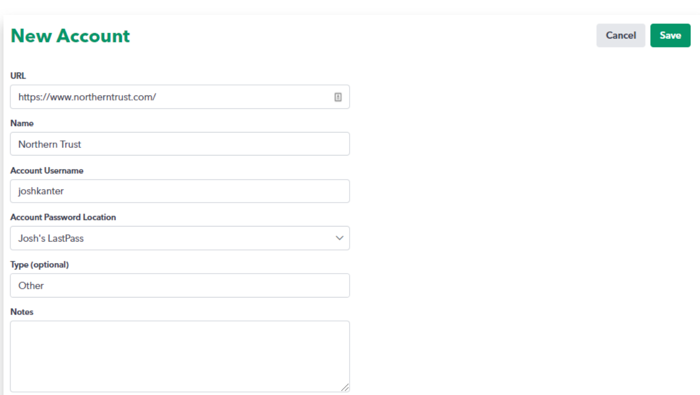
Now, maybe I also want to add a note about the special purpose of this Trust. I can add another Document, using the Note feature, like this:



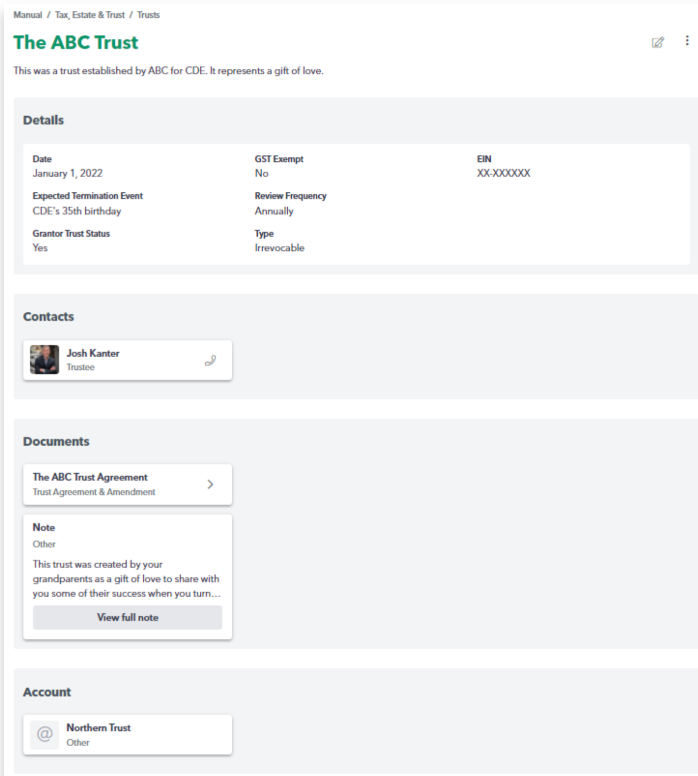
Whether it's by adding notes or contacts to specific Resources, or other memos or videos of explanation, remember that **leaf**planner is trying to get you to think past the "what and where" to the "how and why." Keep thinking about what you know that someone else might not.

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:

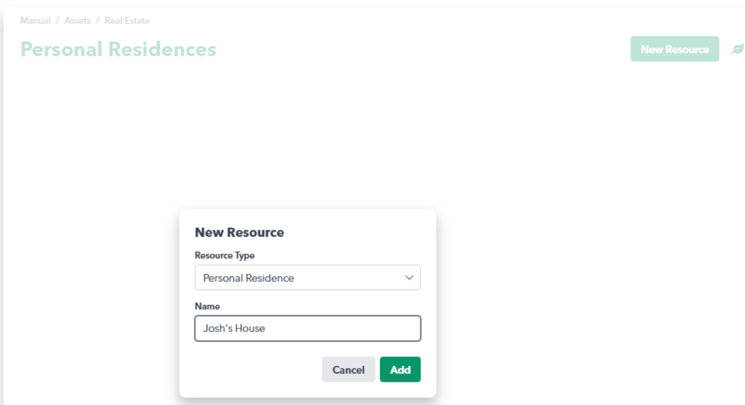


Like always, you can edit or delete the Trust using the icons in the top right.

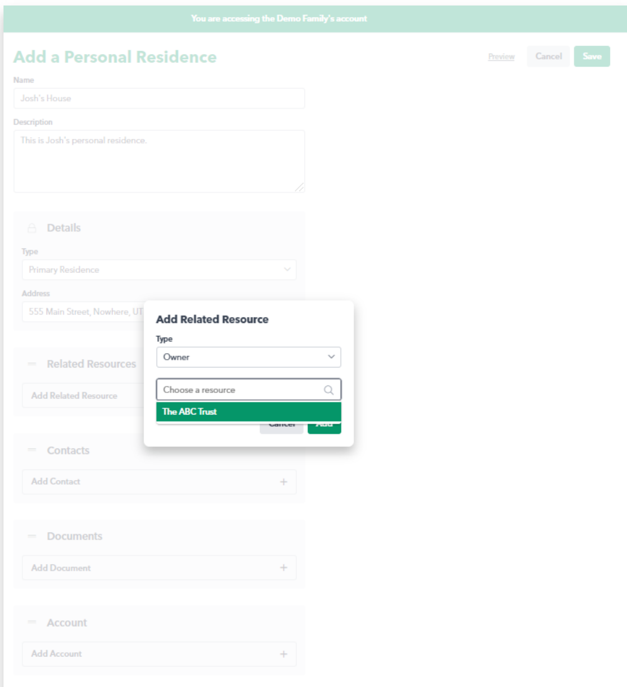
The Power of Related Resources

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.

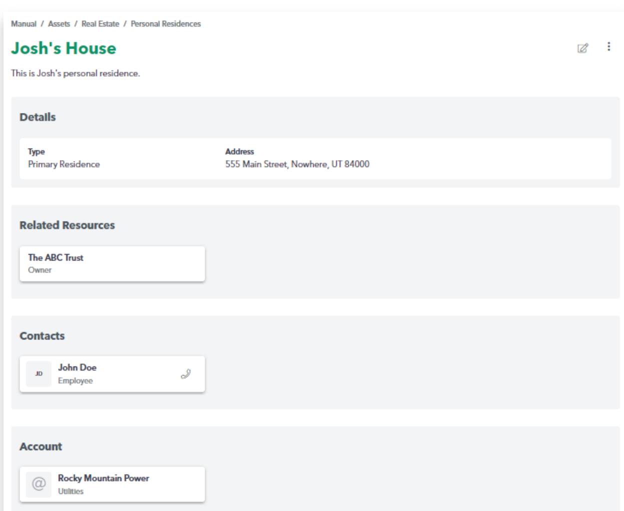
To see this, let's first go and create a house over in Assets, Real Estate, Personal Residences. Go ahead and Add Resource and enter information about the house:



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:



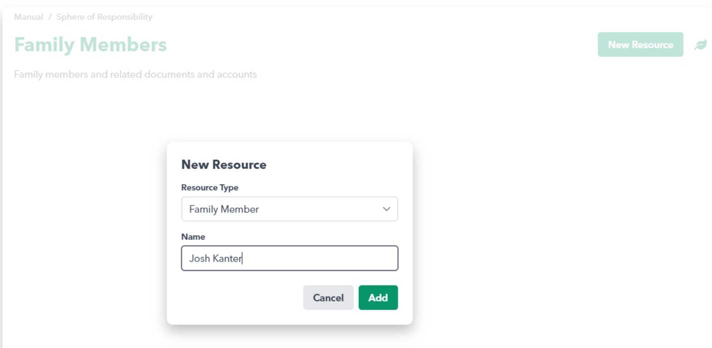
You can add people, documents, accounts, or other related resources. Once you save it, it'll look like this:



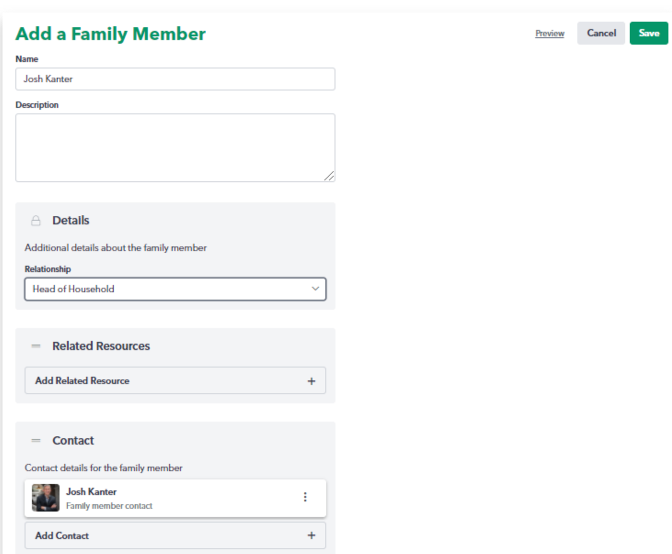
Family Members

Adding family members is just like adding a Contact. In fact, that's exactly what it is, but **leaf**planner 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:



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.



Collections