How-To: Getting Started

Helpful Tips and Suggestions

Congratulations! By signing up for **leaf**planner, you've taken a big step toward bringing the deliberateness of a family office to your family. Nevertheless, as the saying goes, the first step is always the hardest. Once you get started, you'll see how easy it is to use **leaf**planner, and we're confident that you'll find new and unique ways to customize it for your family.

After creating your account and logging in, you will have a few options available to you, feel free to explore, however, we recommend starting with your contacts. Take a few minutes to think about who is on your contact list. Who are the most important people in your life? What key advisors should your family and other advisors know to contact?

Contacts

To add contacts, click on the Contacts tab in the left side menu bar. Here are a few suggestions to get the ball rolling, and don't forget to poke around the **leaf**planner guides for more recommendations:

Lawyers
Accountants
Insurance Brokers
Bankers
Wealth Advisors
Financial Planners
Realtors
Executors, Guardians & Trustees
Religious
Counselors
Key Friends, Mentors & Confidants
Neighbors
Medical Providers
Housekeepers
Vendors

Now you have a list or an idea of who you want to identify in your **leaf**plan. Next, think about why they are important or why you, your family, or your advisors would call on them. How do you know them? What is their expertise? When should they be called? What are they connected to in your world?

Start putting those contacts into your **leaf**plan. This part is pretty simple - just click on the Contacts tab in the left side menu bar of the **leaf**planner app and have at it. You can import contacts from a vCard file, or you can type them in. You can include all of their details or just some basics.

Once you have some contacts in your **leaf**plan, you might start by putting some lists together in the First Things First section. Be simple or creative - maybe you want a list of "People You Should Know," or a list of "My Doctors," or "Our Family's Advisors." Whatever it is, you'll see these lists start to come to life!

Estate Planning

This is usually an easy place to address next because it's so focused on documentation (though we don't want you to forget about the explanations, too!). Grab your estate documents and head over to the Tax, Estate & Trust section. Let the guides do their job and guide you through, or switch to Advanced Mode (remember, you can always switch back-and-forth between Guided and Advanced Modes). Go into a subsection - maybe Wills & Codicils, or Trusts, to get started and upload your first document. You'll see how **leaf**planner will give you the option to input details about the document, including your own narrative. You can connect some of those contacts you created above or add new contacts directly from this section. And when you're ready to input your documents, you have a choice - upload them right into your **leaf**plan, provide an external link to another storage system, like BOX or Dropbox, or just make a note about the physical location of each document. Or do all three - it's entirely up to you.

Insurance

This is another easy place to start because it's easy to understand - what are all of the policies you have? What are the types and coverage details? Who are the carriers? Who are the brokers/agents? Who owns the policies? Who is insured by them? Who are the beneficiaries of them? Dig in - it'll make sense, and it's easy.

Sphere of Responsibility

It doesn't get much easier than adding your family members and pets, so give it a try. The guides are there to help you. Want to include your dog, Astro? What do you want to include? Maybe Astro has a vet, a dog walker or sitter, pet insurance, or even a pet trust. Whatever it is, it'll fit in your **leaf**plan. Your family members may not be as important as your pets, but those are easy too. Please keep in mind, should you desire, to also create a contact for any member of your Sphere of Influence that you add.

In Sphere of Responsibility, you'll see a subsection called Non-Family. Here, as you'll see in the guides, we want you to think broadly about people you're helping or want to help but who may not be a part of your formal planning. How do you want to communicate with your family and advisors about who these people are, why they are important to you, and what you are or want to do for them?

Assets and Liabilities

Some people like to get started taking more of a 'balance sheet approach. Maybe you'll upload a balance sheet - with or without numbers - to First Things First. Then head over the Assets or Liabilities sections and poke around. This ranges from easy and basic (e.g., your homes, cars, boats, etc.) to things that are a bit more nuanced, like private investments. Maybe you want to add a private investment along with the contacts for that investment, the reason you got into it, how you expect to get out of it, what your family and advisors should know about it - whatever you deem necessary. And remember, you can start with some basics and come back later to add more information. Editing an entry is just a click away.

Accounts

While most users will likely find that adding accounts is easiest as you go along through the other Sections, like Contacts, you can head straight over to the Accounts section in the left panel menu section of the **leaf**planner app and start adding accounts directly. You can tie existing accounts to other resources in your **leaf**plan later, whether they relate to your home, your assets, your insurance policies - you name it. Remember, cross-referencing information throughout your **leaf**plan is part of the beauty of the **leaf**planner app, so don't worry about where you start because you can always find and create those connections!

Contact Us

Seriously, we mean it. Still can’t get started or need help to think about how to approach a specific issue or your entire **leaf**plan? No problem - just reach out and we'll schedule a one-on-one session get you rolling.