

Introduction

Document Production System

Professional Document Assembly Software

Document Production System (DPS) is a software program which assembles legal documents and tax returns for professionals. DPS assembles a suite of high-quality, customized legal documents and tax forms in these areas of law:

- Accounting
- Charitable
- Corporations
- Employment
- Estate Planning, including projections and 709
- Income Taxes
- Limited Liability Companies
- Probate, including 706 and 8971
- Real Estate

Created by an experienced attorney who understands a professional's need for affordable document assembly, DPS offers those advantages which are most useful to legal professionals.

DPS is not a "cut and paste -- forms on disk" program. Rather, DPS:

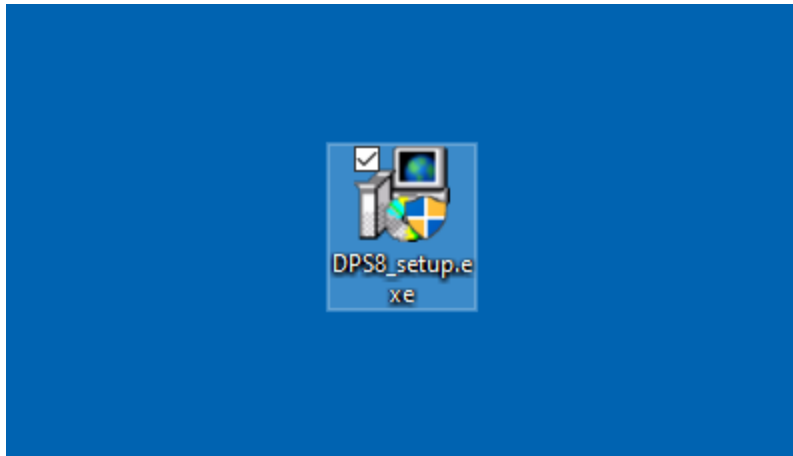
- Prepares state-specific documents in all 50 states and District of Columbia
- Links information between documents, thereby insuring consistency, minimizing data entry, and streamlining updates
- Produces a PDF so that you may view and/or print as well as word processing files (Word and WordPerfect)
- Customizes documents for your client, allowing you to fully meet your client's needs without time consuming and error prone "cut and paste"
- Speeds document assembly to just minutes per document, allowing documents to be on your desk today, rather than next week
- Adjusts pronouns and corrects data validity, formatting and capitalization
- Updates automatically as state and federal laws change
- Facilitates communication between attorney and staff by providing input sheets to use as worksheets

<Root level>

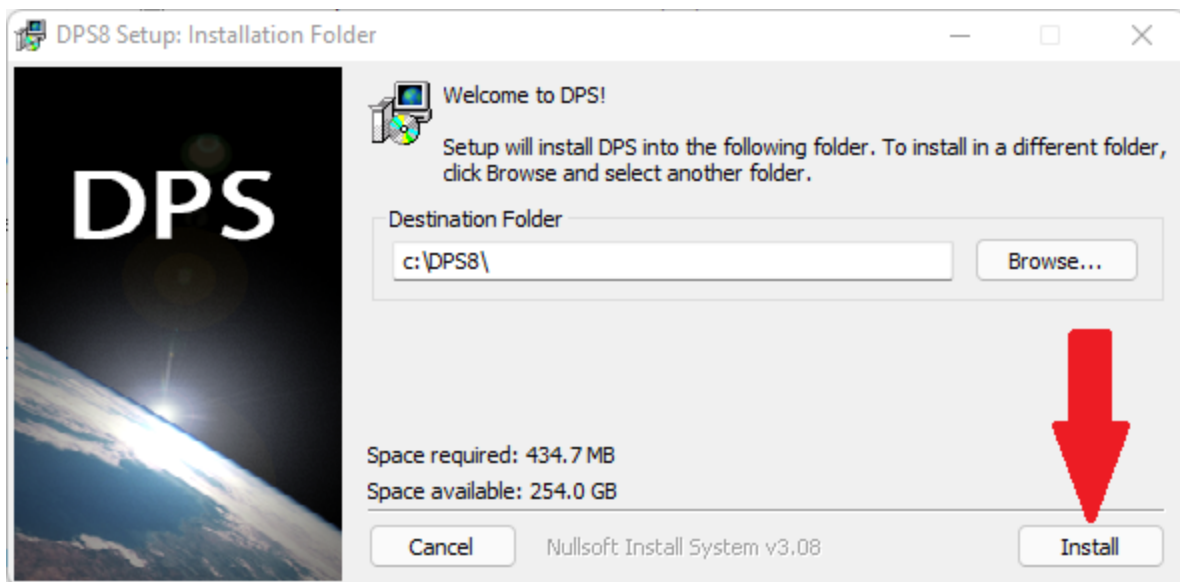
[Click here](#) to send comments on this topic.

Installing DPS 8

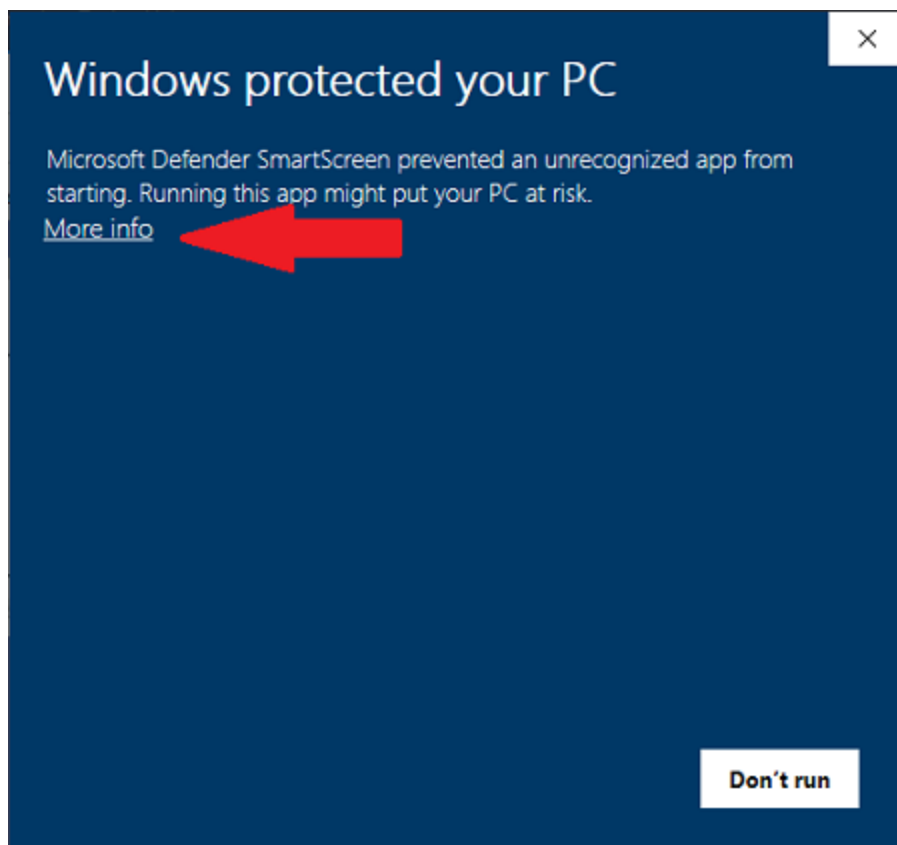
- Regardless of whether you download the setup file for DPS 8 (DPS8_setup.exe) or receive it on a USB from our web site <https://www.dps8.com> the first step is to move it to your desktop.



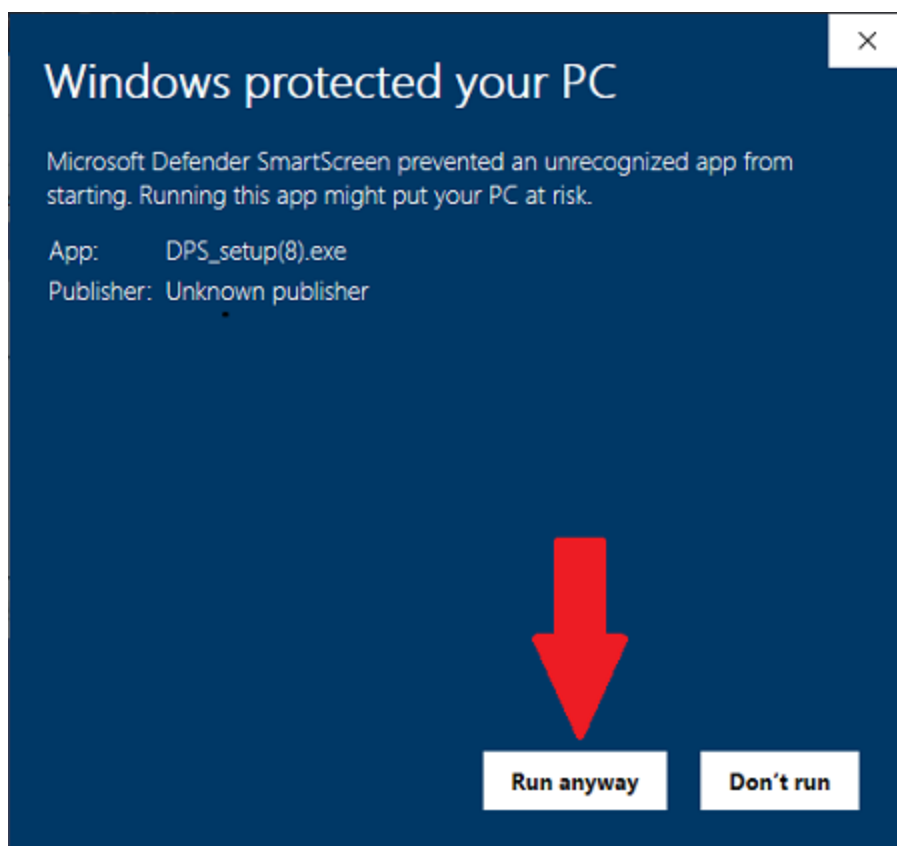
- Double click on DPS8_setup.exe to begin the installation. Without changing the Destination Folder click on the install button to install DPS 8. **If you have an existing DPS it is important that you do not install DPS in the same folder because you will be importing your existing Preparers and Client into DPS 8 in the next step.**



- Based on the security settings on your computer, you may see some warning screens such as this. Click on More info if you get this warning.



- Then click on Run anyway if you get this warning




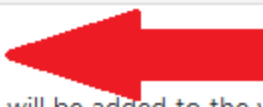
- Click on Trust if you get this warning

Acronis Active Protection

Possible ransomware detected

Acronis Active Protection paused the program that modified your files. Suspicious data has been written to several files

 **DPS_setup(8).exe**
C:\Users\kenda\Downloads\DPS_setup(8).exe
Unknown vendor
[View 85 affected files](#)

Trust 
This program will be added to the whitelist.

Block
This program will be added to the blacklist and affected files will be recovered.

- Download and Install the free JAVA if your get this message.

Java™

Download Help Developers

Search

Help Resources

- > [What is Java?](#)
- > [Remove Older Versions](#)
- > [Disable Java](#)
- > [Error Messages](#)
- > [Troubleshoot Java](#)
- > [Other Help](#)

64-bit Java for Windows

Recommended Version 8 Update 301 (filesize: 81.08 MB)
Release date July 20, 2021

Important Oracle Java License Update
The Oracle Java License has changed for releases starting April 16, 2019.

The new [Oracle Technology Network License Agreement for Oracle Java SE](#) is substantially different from prior Oracle Java licenses. The new license permits certain uses, such as personal use and development use, at no cost -- but other uses authorized under prior Oracle Java licenses may no longer be available. Please review the terms carefully before downloading and using this product. An FAQ is available [here](#).

Commercial license and support is available with a low cost [Java SE Subscription](#).

Oracle also provides the latest OpenJDK release under the open source [GPL License](#) at [jdk.java.net](#).

We have detected you are using Google Chrome and might be unable to use the Java plugin from this browser. Starting with Version 42 (released April 2015), Chrome has disabled the standard way in which browsers support plugins. [More info](#)

Agree and Start Free Download

By downloading Java you acknowledge that you have read and accepted the terms of the [Oracle Technology Network License Agreement for Oracle Java SE](#)

When your Java installation completes, you may need to restart your browser (close all browser windows and re-open) to enable the Java installation.

- > [FAQ about 64-bit Java for Windows](#)
- > [System Requirements](#)

Not the right operating system? [See all Java downloads.](#)

- DPS is installed when you see this screen - click on Close

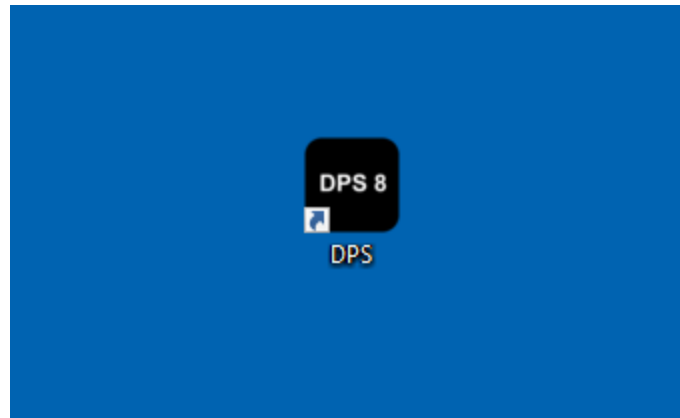
DPS Setup: Completed

Completed

Show details

Cancel Nullsoft: Install System v3.05 < Back Close

- After DPS has been installed, the DPS 8 icon will be on your Desktop - double click on the DPS 8 icon to start DPS 8.



DPS Installations >

[Click here](#) to send comments on this topic.

Network Installs and Updates

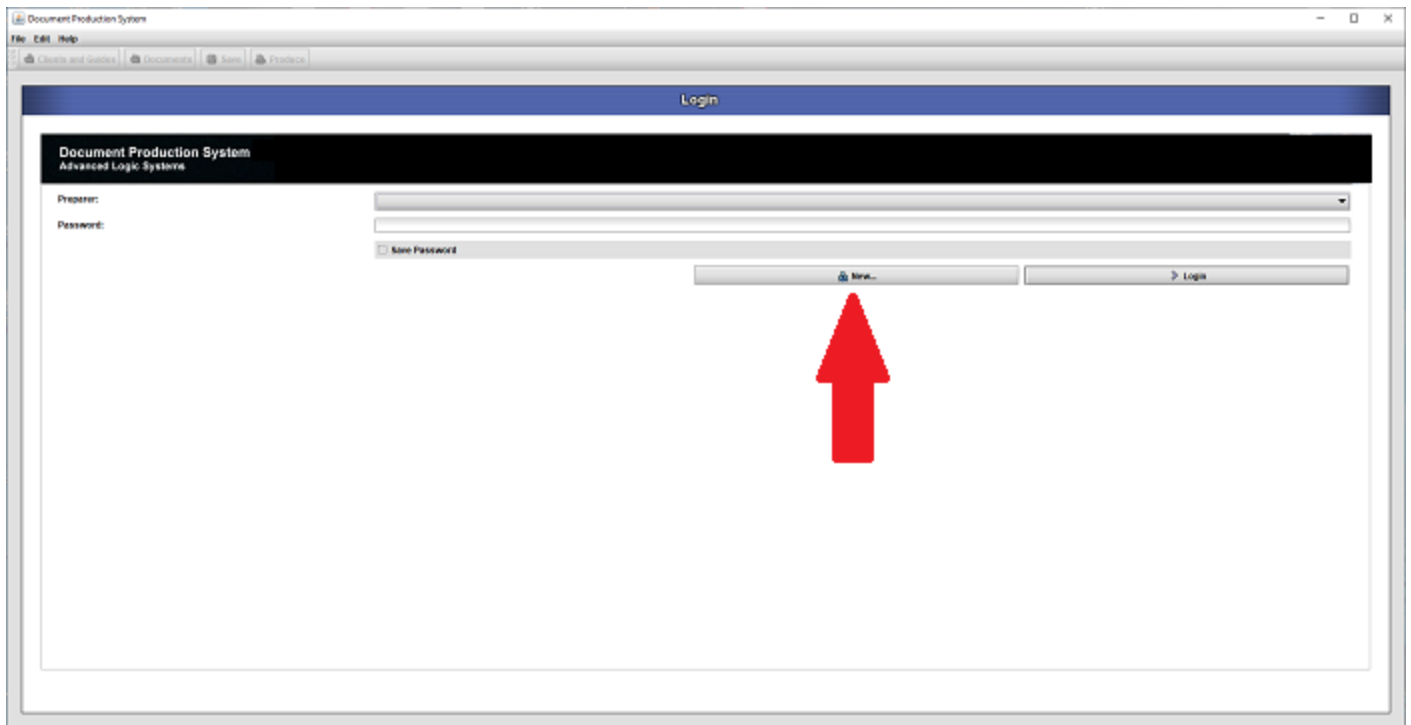
- You may be able to install DPS 8 from a User's computer if the Browse button for the Destination Folder in DPS8_setup.exe shows the appropriate drive. **If not, you should install directly on the server.**
- On each client computer, map a drive letter to the shared folder by using the Map Network Drive option in the Tools menu of Windows Explorer. The client computers must have the shared folder mapped to a drive letter. Accessing the shared folder directly will not work.
- Next create a shortcut on each client computer. The shortcut should point to the dps.exe file on the mapped drive, i.e., F:\DPS8\dps.exe. Set the "Start in" field to the drive and directory where DPS 8 is installed. i.e., F:\DPS8\
- In this example, DPS 8 has been installed on a server, and the DPS folder has been shared. The client computer mapped the shared DPS folder as the F: drive.
- If additional computers are added to the network follow the instructions above on the additional computers.

DPS Installations > [Installing DPS 8](#) >

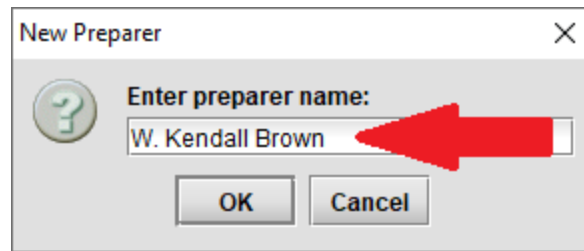
[Click here](#) to send comments on this topic.

New DPS client

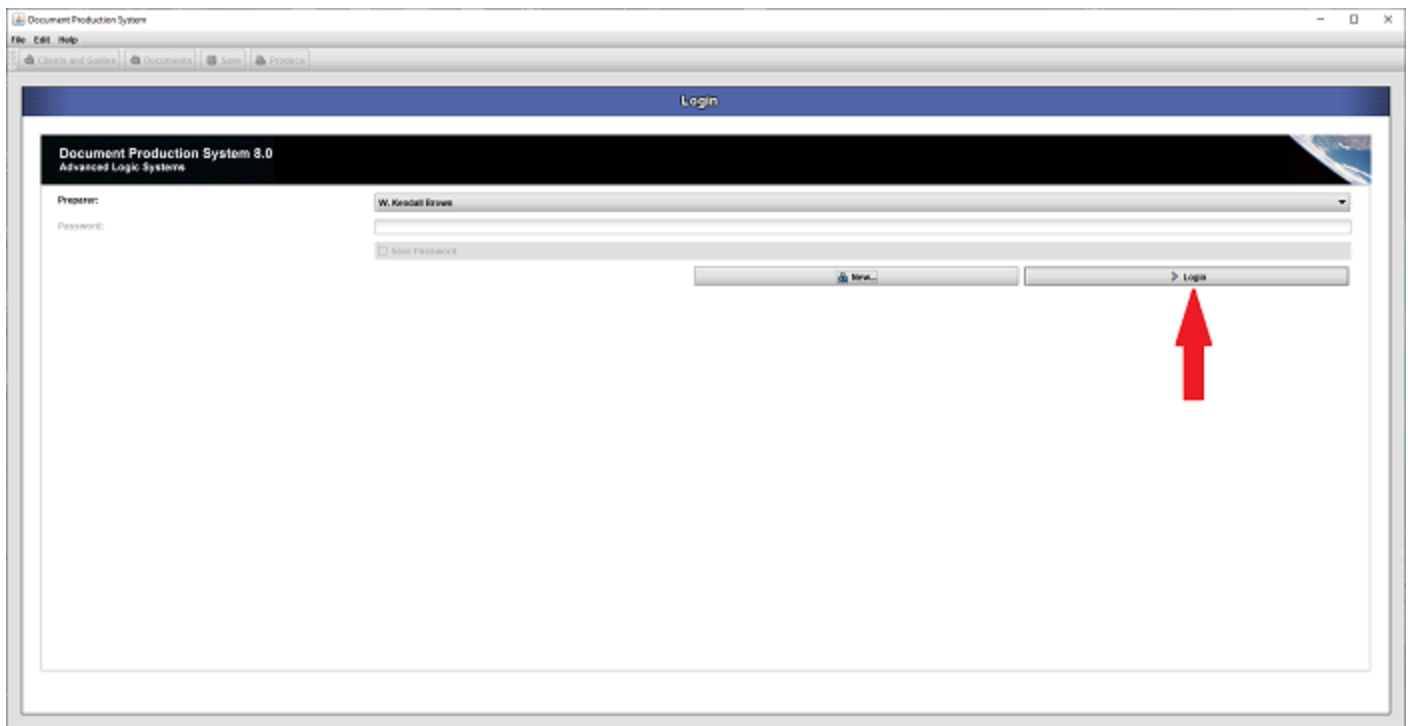
- Double click on the DPS 8 icon to start DPS 8 then click on New to enter yourself as a Preparer



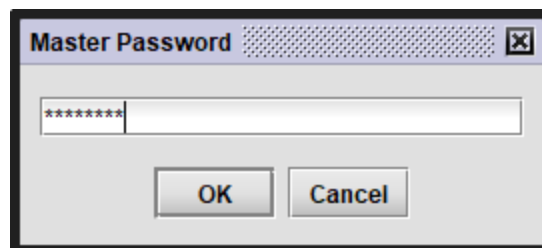
- Enter your name as the new Preparer on the following screen. Click on OK.



- Click Login to enter DPS



- Before you change Firm, Password, Preferences and Preparer information change the Master Password by **clicking on Help then Change Master Password**. The initial Master Password is password (all lower case.) Change it to what you desire and remember it as you will need it whenever you want to change Firm Information, Master Password, Preferences and Preparer Information.



- **Click on Edit then Firm Information** to enter the information regarding your firm. This will be used by some Documents to fill in the information on screens to save you typing.

- **Click on Edit then Preferences** to change how you want your documents to be formatted on the Document tab. Change the way DPS works on the General tab. We suggest that the General tab be filled in as shown below.

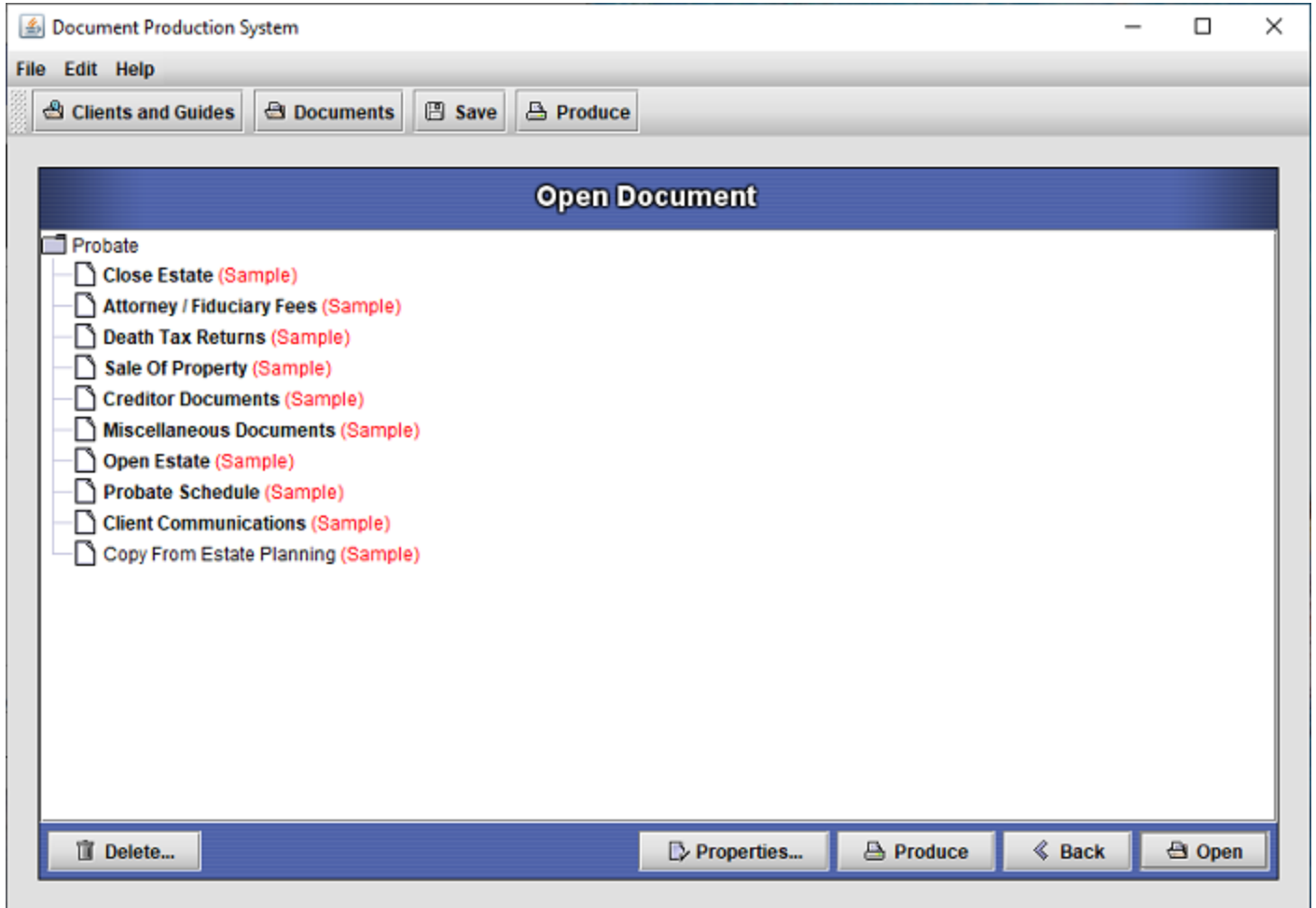
- You are now ready to use DPS 8 on a trial basis. DPS 8 will be fully functional except all documents created will be in pdf format and will have a watermark. To remove the watermark and allow documents to be produced in Word and WordPerfect formats license DPS 8 and enter your PIN.

DPS Installations > [Installing DPS 8](#) >

[Click here](#) to send comments on this topic.

Purchasing DPS 8 and Entering Your PIN

- When you start a Document and see this screen or if you produce a Document and see this watermark you need to purchase a DPS 8 license to receive a client number and PIN that will fully enable your DPS 8. Call us at 515-282-7702 or email us at support@dps8.com



AMENDED
United States Estate (and Generation-Skipping Transfer) Tax Return

OMB No. 1545-0015

Form **706**
Rev. August 2010
Department of the Treasury
Internal Revenue Service

▶ Estate of a citizen or resident of the United States (see instructions). To be filed for decedents dying after December 31, 2018.
▶ Go to www.irs.gov/Form706 for instructions and the latest information.

Part 1 — Decedent and Executor		2 Decedent's social security no. 000-00-0000	
1a Decedent's first name and middle initial (and maiden name, if any) Name Of Maiden Name		1b Decedent's last name Decedent	
3a City, town, or post office; county, state or province; country; and ZIP or foreign postal code Co Of Decedent County, City Of Decedent, Iowa 00001		3b Year domicile established 1901	4 Date of birth 1-1-00
6a Name of executor (see instructions) See attached list		5 Date of death January 2, 2020	
6c Executor's social security number (see instructions) See attached list		6b Executor's address (number and street including apartment or suite no.; city, town, or post office; state or province; country; and ZIP or foreign postal code) and phone no. See attached list	
6d If there are multiple executors, check here <input checked="" type="checkbox"/> and attach a list showing the names, addresses, telephone numbers, and SSNs of the additional executors.			
7a Name and location of court where will was probated or estate administered Iowa District Court, Co Of Court County, Iowa			7b Case number Probate No
8 If decedent died testate, check here <input checked="" type="checkbox"/> and attach a certified copy of the will. 9 If you extended the time to file this Form 706, check here <input type="checkbox"/>			
10 If Schedule R-1 is attached, check here <input type="checkbox"/> . 11 If you are estimating the value of assets included in the gross estate on line 7 pursuant to the special rule of Reg. section 20.2011-3(a)(7)(B), check here <input type="checkbox"/>			
1 Total gross estate less exclusion (from Part 5—Recapitulation, item 13)		1	\$10,884,344
2 Tentative total allowable deductions (from Part 5—Recapitulation, item 24)		2	490,706
3a Tentative tax (subtract line 2 from line 1)		3a	\$10,393,638
3b State death tax deduction		3b	1,006,041
3c Taxable estate (subtract line 3b from line 3a)		3c	\$9,387,597
4 Adjusted tax credits (see instructions)		4	2,002
5 Add lines 3c and 4		5	\$9,389,599
6 Tentative tax amount (subtract line 5 from line 3c)		6	\$3,701,640
7 Total gift tax (or payable) (see instructions)		7	1,003
8 Gross estate tax (add lines 6 and 7)		8	\$3,698,637
9a Basic exclusion amount		9a	\$11,580,000
b Deceased spousal unused exclusion (DSUE) amount from predeceased spouse(s), if any (from Section D, Part 6—Portability of Deceased Spousal Unused Exclusion)		9b	65,007
c Restored exclusion amount (see instructions)		9c	0
d Applicable exclusion amount (add lines 9a, 9b, and 9c)		9d	\$11,645,007
e Applicable credit amount (tentative tax on the amount in line 9d from Table A in the instructions)		9e	\$4,603,803
10 Adjustment to applicable credit amount (May not exceed \$6,000. See instructions.)		10	4,004
11 Allowable applicable credit amount (subtract line 10 from line 9e)		11	4,599,799
12 Subtract line 11 from line 8 (but do not enter less than zero)		12	\$0
13 Credit for foreign death taxes (from Schedule P). (Attach Form(s) 706-CE)		13	6
14 Credit for tax on prior transfers (from Schedule Q)		14	7
15 Total credits (add lines 13 and 14) . . . (Section 2012 credit = \$5)		15	18
16 Net estate tax (subtract line 15 from line 12)		16	\$0
17 Generation-skipping transfer (GST) taxes payable (from Schedule R, Part 2, line 10)		17	5,005
18 Total transfer taxes (add lines 16 and 17)		18	\$5,005
19 Prior payments (explain in an attached statement)		19	8
20 Balance due (or overpayment) (subtract line 19 from line 18)		20	\$4,997

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than the executor) is based on all information of which preparer has any knowledge.

Sign Here	Signature of executor Name Of Executor 1	Date May 2014
	Signature of executor Name Of Executor 2	Date May 2014

Paid Preparer Use Only	Print/Type preparer's name Name Of Preparer	Preparer's signature	Date (N144.48)	Check <input checked="" type="checkbox"/> if self-employed	PTN
	EIN 00000000	Name of Firm 1	Firm's EIN 00-0000030		
	Firm's address 558 28th Street, Suite 1, Des Moines, Iowa 50312	Firm's phone no. 515-282-7702			

For Privacy Act and Paperwork Reduction Act Notice, see instructions. Cat. No. 2014FR Form 706 (Rev. 8-2013)

Demo

- When you license DPS 8 we will send you a unique client number and PIN. When you receive your client number and PIN, run DPS 8 and **click on Help then Enter PIN**. After entering your client number and 16 digit PIN on the screen shown below, your DPS 8 will be activated and ready to use.

Enter PIN ✕

Client Number:

PIN: - - -

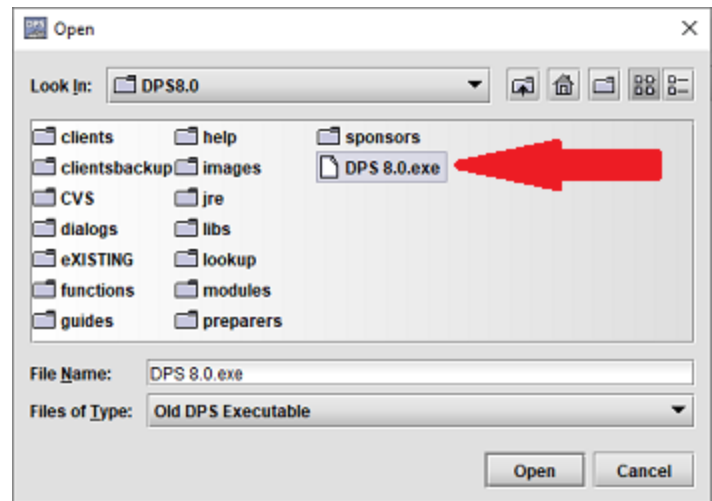
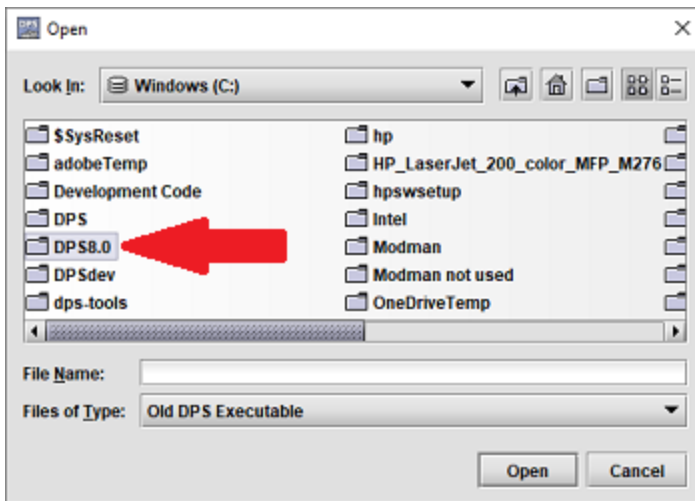
- Go to <http://www.dps8.com/DPS/cost.php> to get the cost to license DPS 8 considering which documents will be licensed, your state and the size of your firm.

DPS Installations > [Installing DPS 8](#) > [New DPS client](#) >

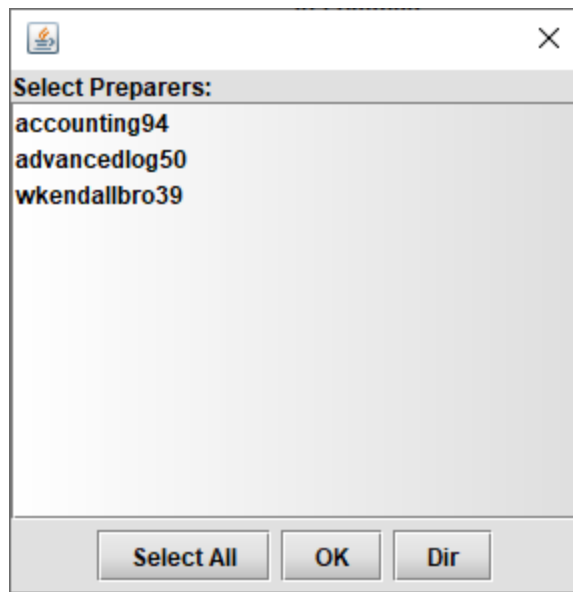
[Click here](#) to send comments on this topic.

Importing Preparers and Client to DPS 8

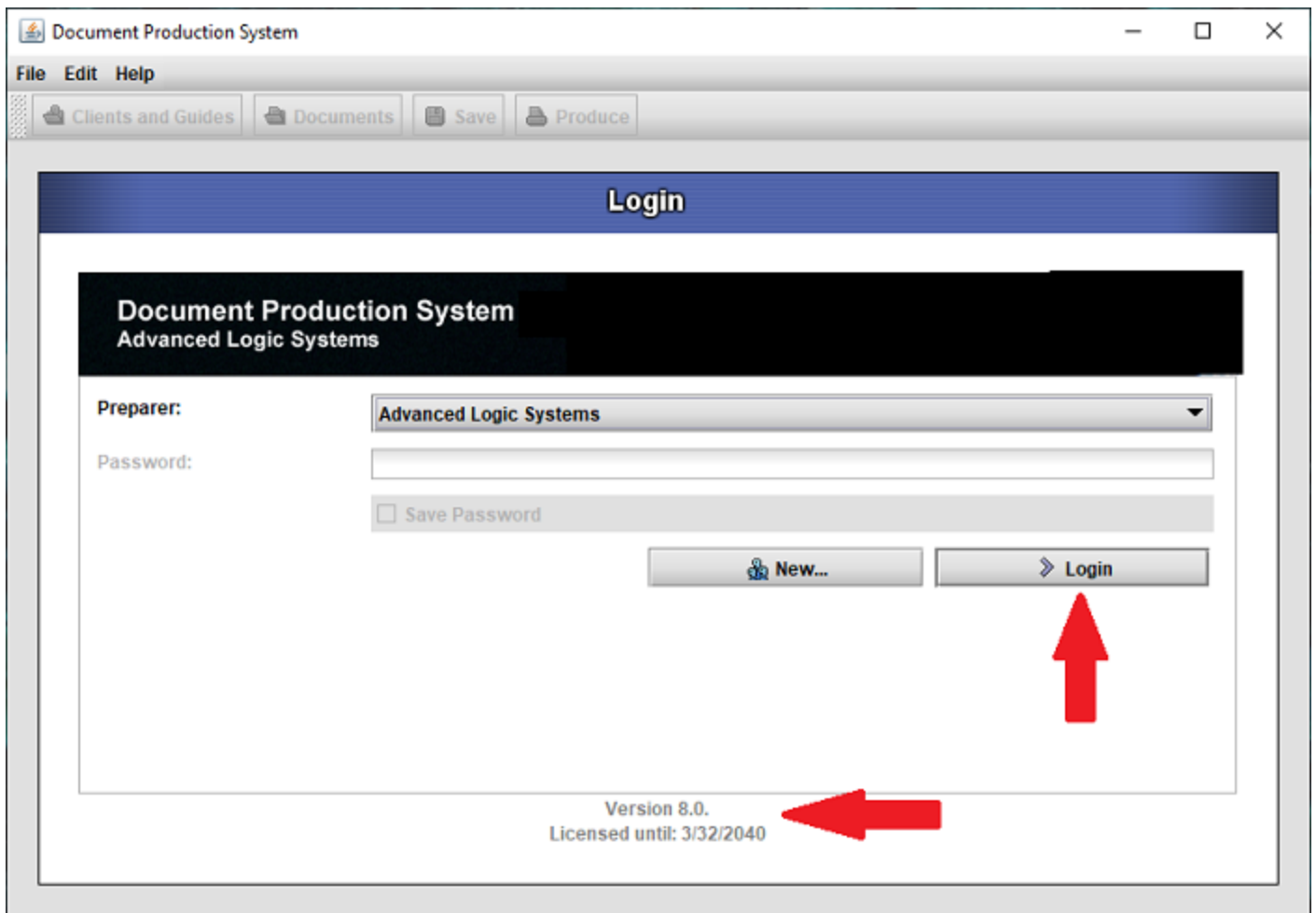
- Double click on the DPS 8 icon to start DPS 8 then **click on File then Import Preparers** to import one or more Preparers and their Clients from your existing DPS. On the screens below locate your existing DPS and select the DPS 8.0.exe



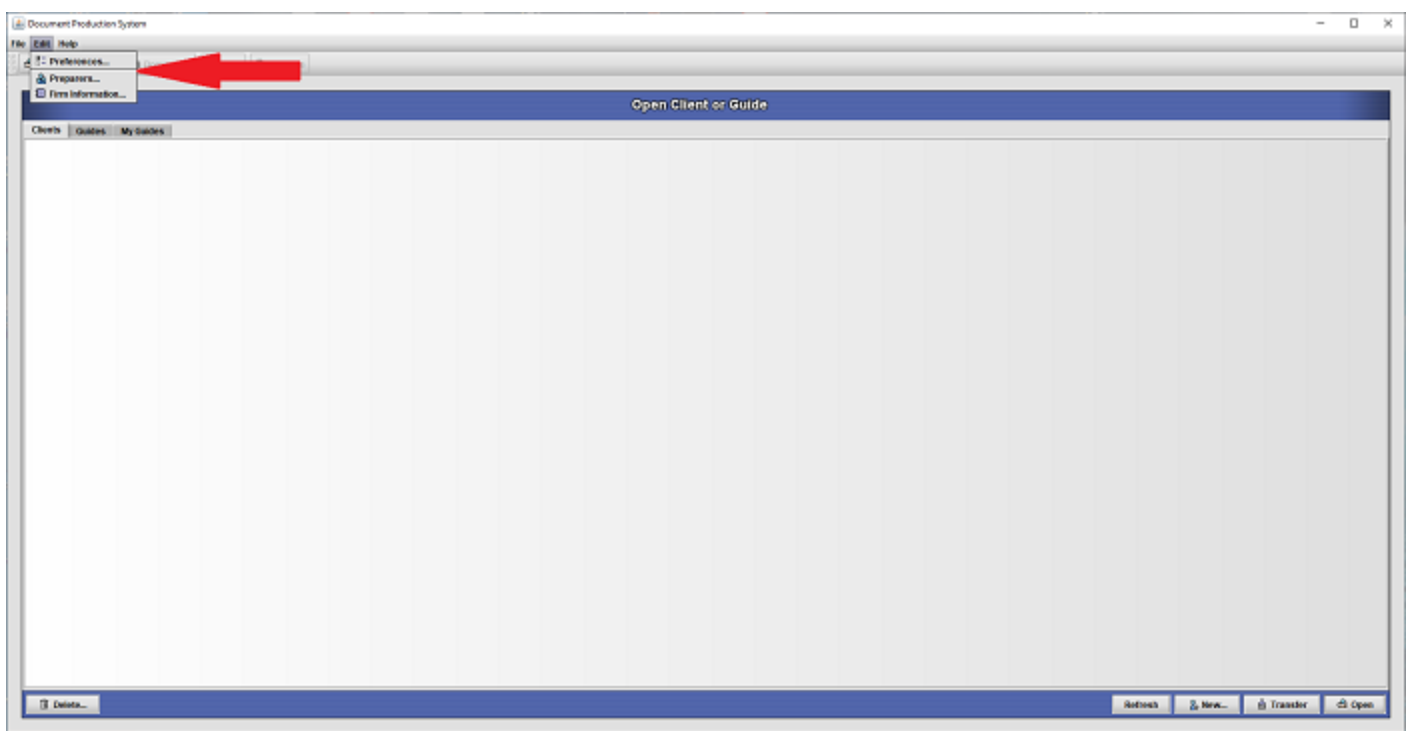
- On the following screen either highlight the Preparers you want to import or click on Select All then click OK.



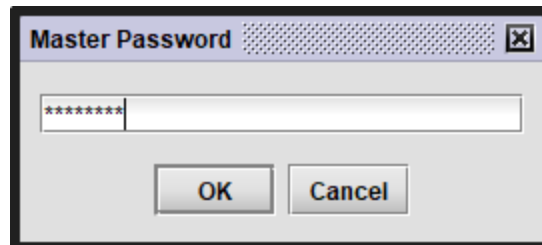
- Note that your existing Client Number and PIN have also been imported from your existing DPS and that your existing DPS folder remains so you can import additional Preparers and Clients in the future. After the Preparers and their Clients have been imported, Login to DPS 8.



- Click on **File, Edit or Help** to change and enter Information.



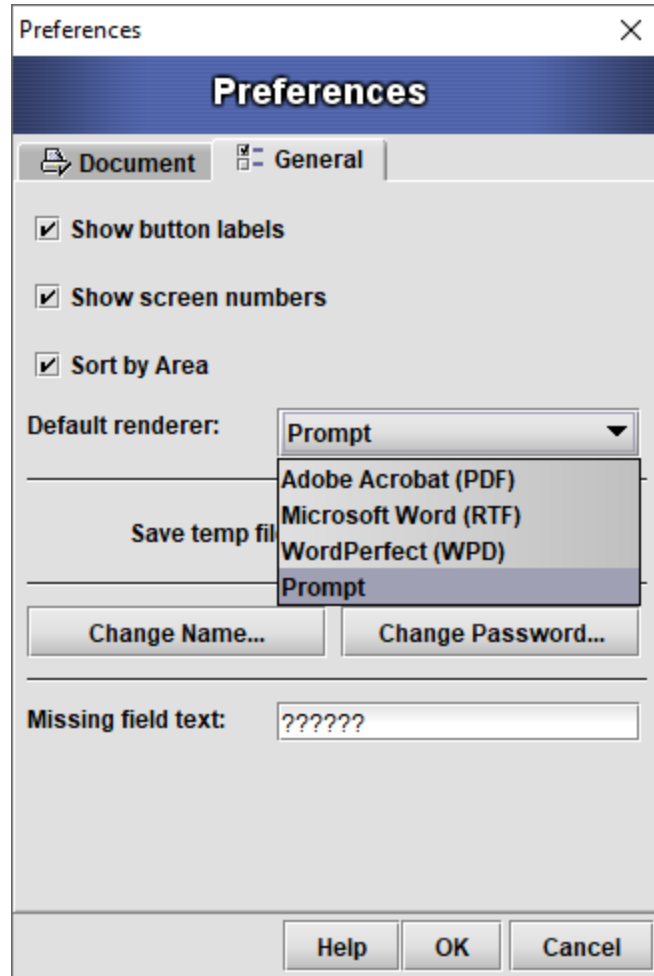
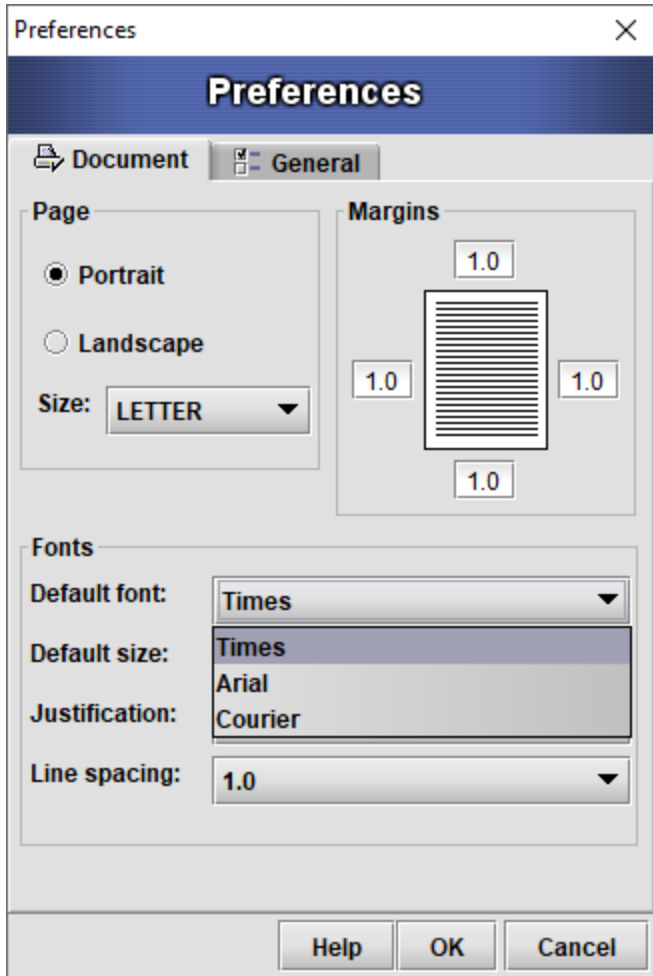
- Before you change Firm, Password, Preferences and Preparer information change the Master Password by **clicking on Help then Change Master Password**. The initial Master Password is password (all lower case.) Change it to what you desire and remember it as you will need it whenever you want to change Firm Information, Master Password, Preferences and Preparer Information.



- **Click on Edit then Firm Information** to enter the information regarding your firm. This will be used by some Documents to fill in the information on screens to save you typing.



- **Click on Edit then Preferences** to change how you want your documents to be formatted on the Document tab. Change the way DPS works on the General tab. We suggest that the General tab be filled in as shown below.



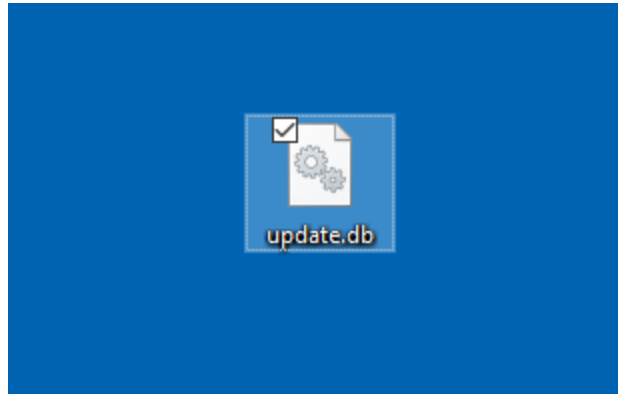
- You are now ready to use DPS 8.

DPS Installations > [Installing DPS 8](#) > Existing DPS client >

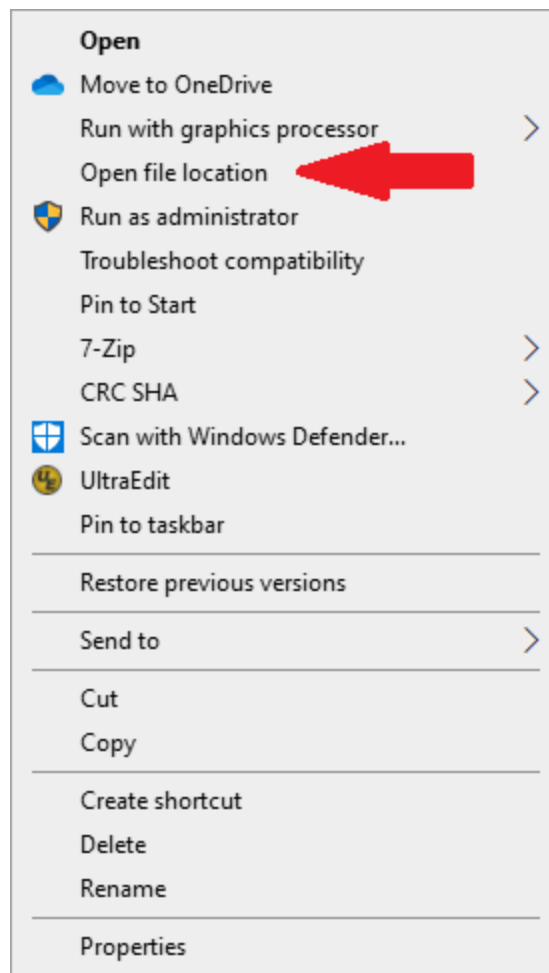
[Click here](#) to send comments on this topic.

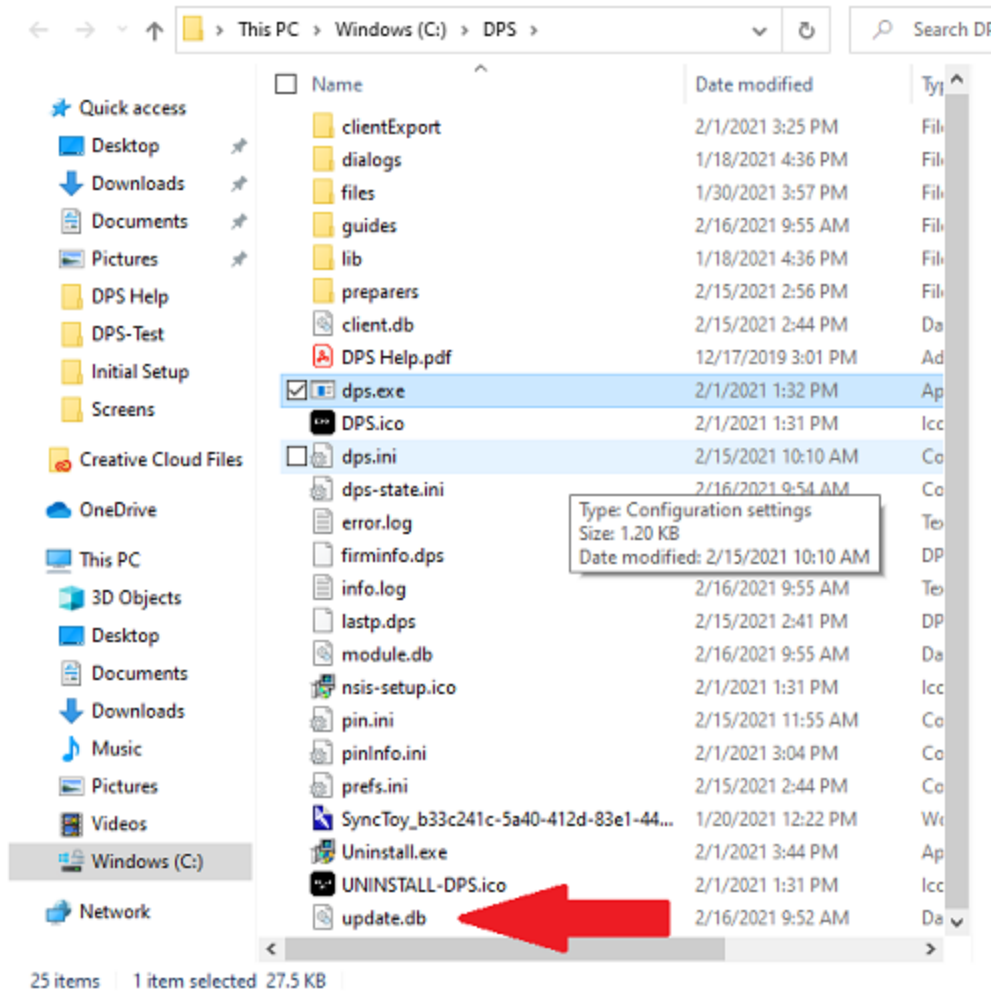
Installing Update for DPS 8

- Regardless of whether you download the update file for DPS 8 (update.db) or receive it on a USB from our web site <https://www.dps8.com> the first step is to move it to your desktop.



- To update DPS 8 you need to move update.db to the folder where DPS 8 is located. To find where DPS 8 is located, right click on DPS 8 icon and select Open file location. Drag update.db to the DPS 8 folder.





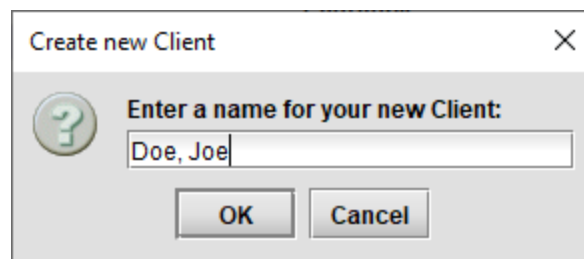
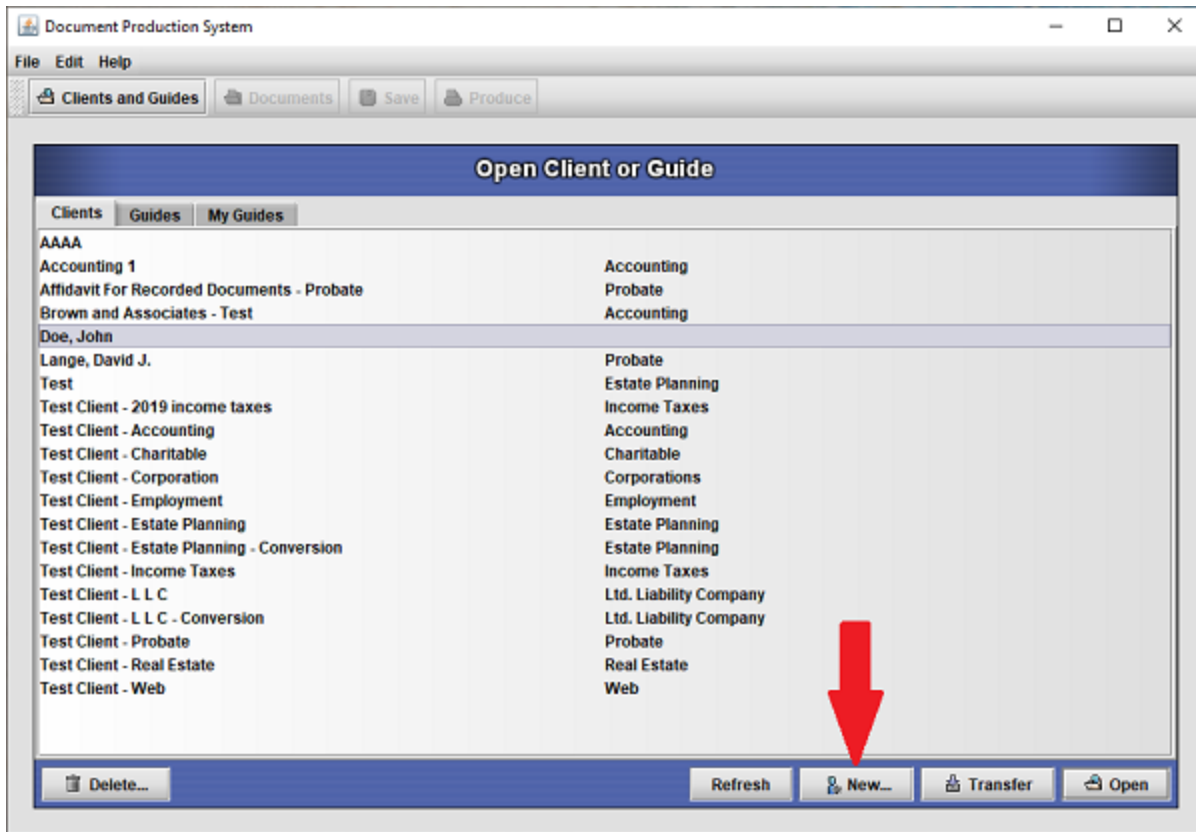
- The next time you run DPS 8 it will automatically apply the update.db and DPS 8 will be completely up to date.

DPS Installations >

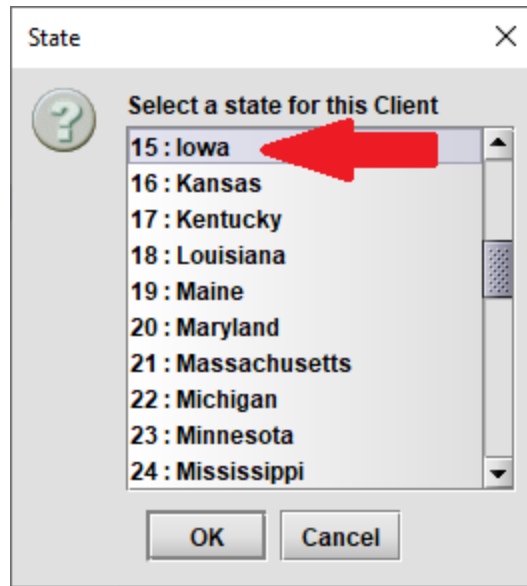
[Click here](#) to send comments on this topic.

Create New Client

- After you login you will go to the Open Client or Guide screen. Select New and name your new client. Because clients are listed in alphabetical order, name your client last name, first name.



- Then select the state law which is to be used for this client.

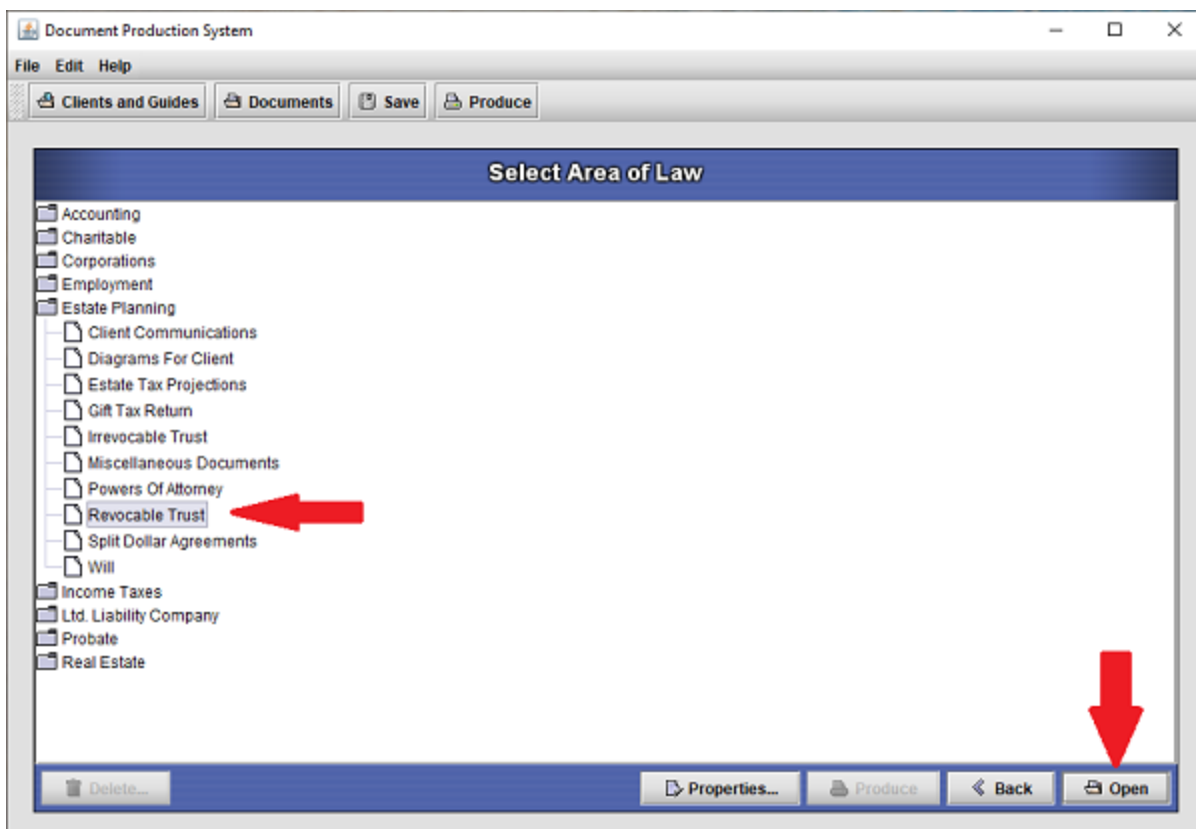
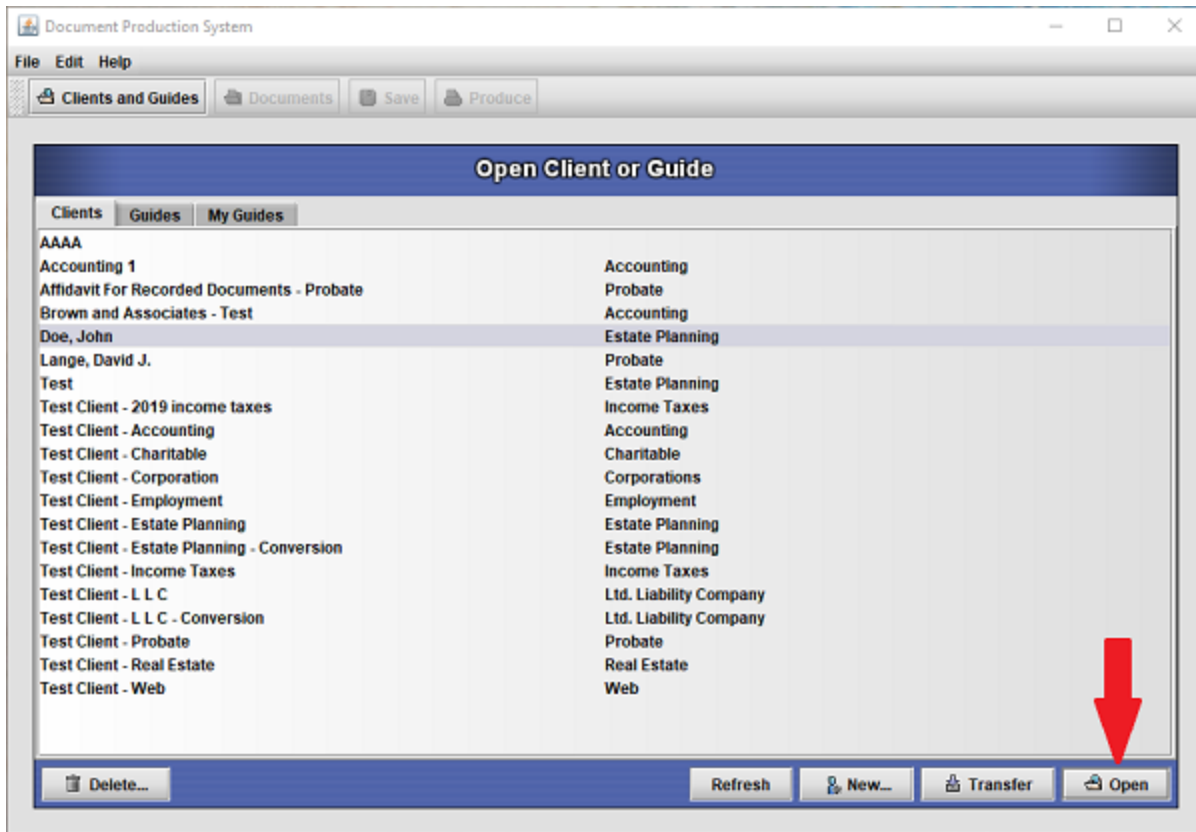


Create New Client >

[Click here](#) to send comments on this topic.

Select Area Of Law And Document

- Open the new client and then Select the Area of Law and then the document to be prepared for this client. Both lists are shown in alphabetic order.



- Click on Properties to see information regarding the Document selected.

Document Properties

Name: Revocable Trust

Area: Estate Planning

ID: RE03

States: Alabama
Alaska
Arizona
Arkansas

Description: This Document contains: Revocable Trusts for married and single clients.

This Document may have these provisions: (1) Designation of spouse and children. (2) Specific bequest of items or dollars. (3) Rights of withdrawal for spouse and other beneficiaries. (4) Marital bequest, including a maximum of 3 recipients (spouse, spouse's

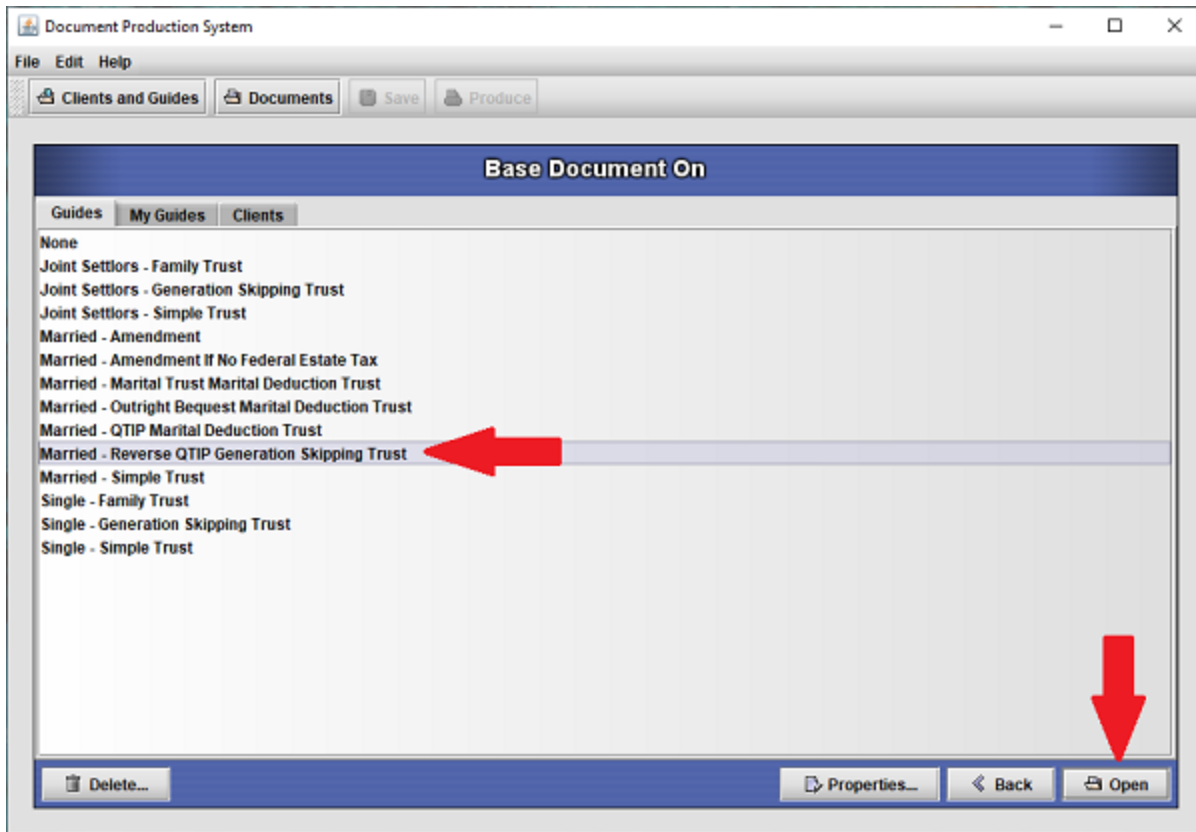
Ok

Create New Client >

[Click here](#) to send comments on this topic.

Select Guide

- Open the new Document and then Select the Guide upon which the document will be based. The Guide will fill in many of the screens with the correct information for the document.



- Click on Properties to see information regarding the Guide selected.

✕

Guide Properties

Name:

State:

Comment:

Create New Client >

[Click here](#) to send comments on this topic.

Enter Information

- Enter the information requested on each of the screens. This is the name entry screen N109. Clicking on the icon to the right of the name will give a list of names used in this document. If one of those names is selected or if a previously used name is entered on line 1, the rest of the information on the screen will automatically be entered. Changing information relating to such a previously used name will change that information on all other screens having such previously used name.
- Certain lines are required to be completed and are so labeled. The screen cannot be left until those lines are completed. Other lines are optional.
- Lines relating to certain matters, such as State, are formatted and require the name of a state to be entered. The abbreviation of the state name can be entered and it will change to either the full name of the state or the abbreviation as appropriate for the document.
- When the lines on the screen are completed click on Next to go to the next screen.

Document Production System

File Edit Help

Clients and Guides Documents Save Produce

Doe, Joe Revocable Trust - N109

Settlor

< Back Next >

Name Of Settlor John Doe REQUIRED

Street Address

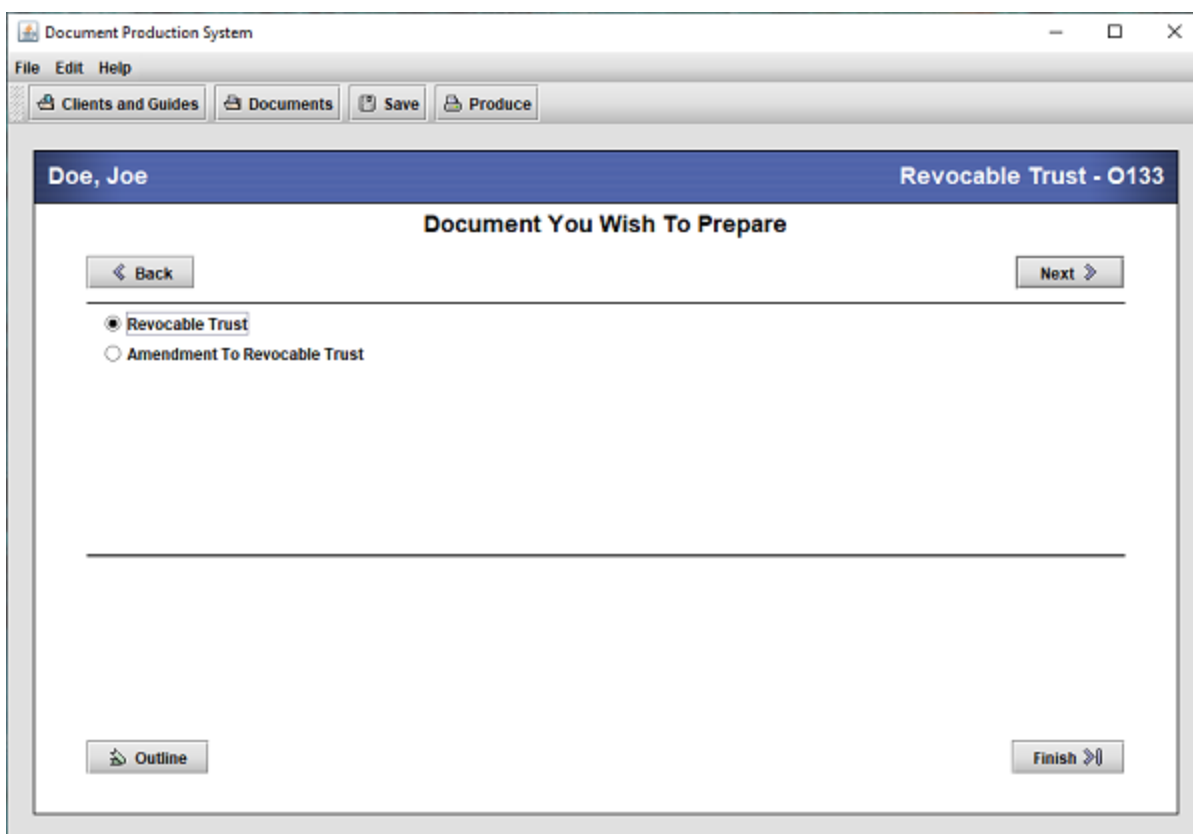
County Polk

City

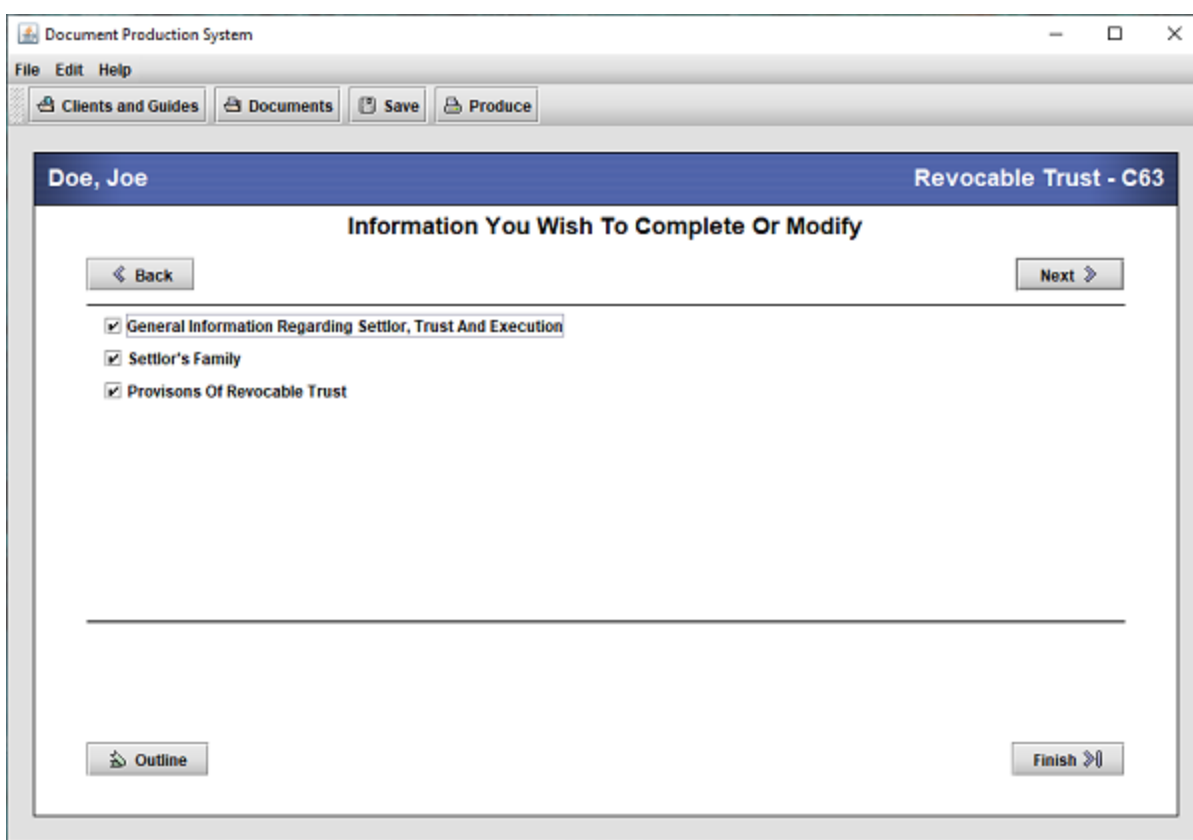
State IOWA REQUIRED

Outline Finish >>

- This is the option button screen O133. Only one line on this screen can be selected. Subsequent screens will appear or not based on which line is selected. Only the screens required to be completed based on selections made will appear. Click on Next to go to the next screen.



- This is the check box screen C63. One or more lines on this screen can be selected. Subsequent screens will appear or not based on which line(s) is selected. Only the screens required to be completed based on selections made will appear



- Any time you want to save your answers you can click on the Save button located on the tool bar. DPS 8 periodically saves your answers based on the settings found at Edit/Preferences/General settings.

[Click here](#) to send comments on this topic.

Tips

- Some screens will have Tips show at the bottom. These Tips will provide information related to how the screen is to be completed.

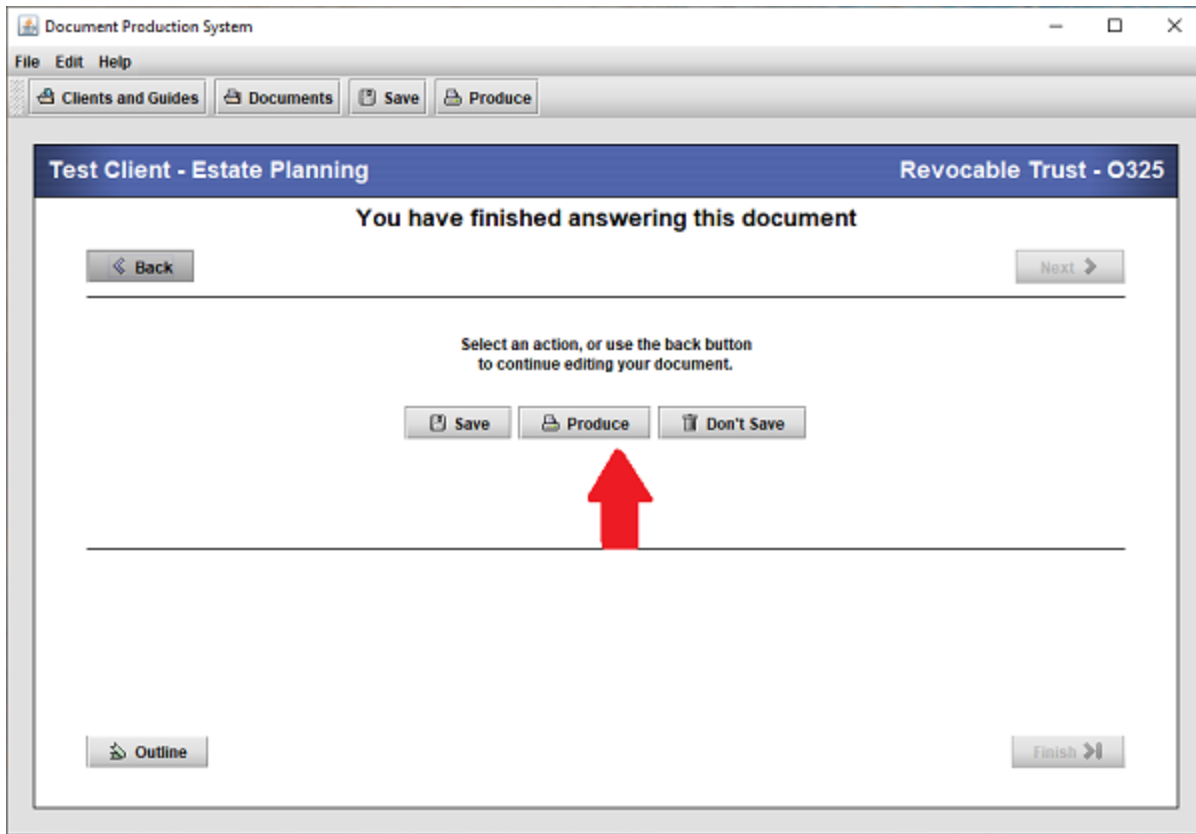
The screenshot shows a window titled "Document Production System" with a menu bar (File, Edit, Help) and a toolbar (Clients and Guides, Documents, Save, Produce). The main content area is titled "Test Client - Corporation" and "Articles Of Incorporation - N17". Below this is a "Corporation" form with a "Name Of Corporation" field and a "REQUIRED" label. The form has "Back" and "Next" buttons. Below the form is a tip section with a red arrow pointing to the text: "This is an example of a Name/Data Screen. To complete it, merely fill in the blank." and "Capitalization." with two radio button options: "If you enter information in all lower case letters, DPS will change the capitalization to have a capital letter at the beginning of each word." and "If you enter both upper and lower case letters, DPS will not change the capitalization." The tip section also has "Outline" and "Finish" buttons.

Create New Client >

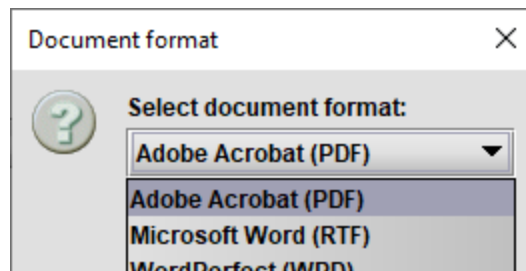
[Click here](#) to send comments on this topic.

Produce Document

- When all necessary screens have been complete this Produce screen will appear. Select Save to save the information entered on all of the screens. Select Produce to produce the document.



- If you have selected Prompt on the Document Preferences screen and there are no graphics in the document, select in which format the document is to be produced. If the document contains graphics, such as forms, it must be produced as a PDF. If the documents is produced in a word processing format it will open in that word processor and modifications can be made.



- A PDF document will be opened in your default pdf renderer.

**Name Of Revocable Trust
Restated, Amended and Substituted**

Agreement

This agreement made and executed in duplicate at _____, Illinois, this June _____, 2010, by and between Name Of Grantor, Street Of Grantor, County Of Testator County, City Of Grantor, Iowa, the "Settlor"; and John Smith, Street Of Testator, City Of Testator, Iowa, the "Trustee".

This Agreement shall constitute a restatement and amendment of the Revocable Trust executed by Settlor on January 1, 2001 ("Original Revocable Trust"), and shall be substituted for and be in lieu of said original agreement and all amendments thereto. Any references made in forms for assignment of ownership, beneficiary change forms, testamentary documents, or legal documents of any type, to such Original Revocable Trust, or to any trust or trusts created thereunder, shall be deemed to refer to this Restated, Amended and Substituted Name Of Revocable Trust Agreement and to the trusts created hereunder.

All changes incorporated herein are made pursuant to the power reserved to Settlor in the Original Revocable Trust.

The Original Revocable Trust shall continue in accordance with the provisions of this restated, amended and substituted agreement, and the Trustee agrees to hold, manage and distribute the property held by it under such trust, together with any additional property of any kind or character hereafter transferred, conveyed, assigned and delivered by deed or bequeathed or devised by Last Will And Testament or otherwise to the Trustee, upon the terms, trusts and conditions hereinafter set forth.

**Article I
Husband And Wife**

Name Of Grantor and Jane Doe are Husband And Wife.

- Before using DPS 8, you need the free Adobe Acrobat Reader installed. This allows you to view and print PDF documents generated by DPS 8. If you don't already have Acrobat installed, download it from Adobe by going to <https://www.adobe.com/acrobat/pdf-reader.html> in your web browser.
- If you get an error when trying to print from DPS 8, you either don't have the Reader installed, or DPS 8 doesn't know where the Reader is.

Create New Client >

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Accounting

Accounting

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Time Sheets** - AC01
 - O19.2=1
 - **Billing** - AC04
 - O20.2=1

Create New Client > Documents With Graphics >

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Charitable

Charitable

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Client Communications** - CH01
 - C1.1=1
 - C1.2=1 AND O2.1=1
 - C1.3=1 AND N3.40 is not blank
 - **Articles Of Incorporation** - CH10
 - If state is FL, NV, VA
 - **Bylaws** - CH20
 - None
 - **Minutes** - CH30
 - None
 - **Application For Exempt Status** - CH50
 - Cannot export
 - **Miscellaneous Documents** - CH80
 - C1.2=1 AND N11.2=35 (state is OH)
 - C1.3=1 AND N11.2=35 (state is OH)

Create New Client > Documents With Graphics >

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Corporations

Corporations

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Articles Of Incorporation -- AR03**
 - C19.1=1 (state is IL)
 - **Bylaws -- BY03**
 - None
 - **Client Communications -- CO01**
 - C1.1=1
 - C1.3=1
 - C1.2=1 AND O2.1=1
 - C1.4=1 AND O2.1=1
 - C1.5=1 AND N11.4 is not blank
 - **Securities -- CO50**
 - C1.3=1
 - C1.4=1
 - C1.5=1
 - C1.8=1
 - C1.1=1 AND O18.7=0
 - C1.6=1 AND O18.7=0
 - **Miscellaneous Documents -- CO80**
 - C1.2=1 AND N4.4=9 (state is FL)
 - C1.4=1 AND N4.4=9 (state is FL)
 - C1.5=1 AND N4.4=9 (state is FL)
 - C1.6=1 AND N4.4=9 (state is FL)
 - C1.7=1 AND N4.4=9 (state is FL)
 - **Your Documents -- CO85**
 - O9.1=1 AND C5.1=1
 - O9.1=1 AND C5.4=1
 - **Minutes -- MI03**
 - None

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Employment

Employment

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Employee Information** -- EM05
 - None
 - **Employment Contract** -- EM20
 - O3.1=1
 - O3.2=1
 - O3.4=1
 - **Deferred Compensation Agreement** -- EM25
 - O3.1=1
 - O3.2=1
 - O3.4=1
 - **Non-Solicitation Agreement** -- EM28
 - O3.1=1
 - O3.2=1
 - O3.4=1
 - **Non-Compete Agreement** -- EM30
 - O3.1=1
 - O3.2=1
 - O3.4=1

Create New Client > Documents With Graphics >

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Estate Planning

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Client Communications** -- EP05
 - C1.2=1
 - C1.4=1
 - C1.1=1 AND O28.1=1
 - C1.3=1 AND O29.1=1
 - C1.6=1 AND N99.4 is not blank
 - C1.7=1 AND N99.4 is not blank
 - **Prepare Documents** -- EP06
 - None
 - **Diagrams For Client** -- EP10
 - Cannot export
 - **Gift Tax Return** -- EP25
 - Cannot export
 - **Irrevocable Trust** -- LI03
 - O305.1=1
 - **Miscellaneous Documents** -- LT03
 - C1.1=1 AND O24.7=0
 - **Estate Tax Projections** -- PR03
 - Cannot export
 - **Powers Of Attorney** -- PW03
 - C17.2=1 AND O13.1=1
 - **Revocable Trust** -- RE03
 - O305.1=1
 - **Split Dollar Agreements** -- SP03
 - None

- **Will** -- WI03
 - O112.1=1
 - O392.1=0

Create New Client > Documents With Graphics >

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Income Taxes

Income Taxes

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Copy DPS Client Information -- IT03**
 - None
 - **Estimated Taxes Vouchers -- IT10**
 - Cannot export
 - **Income Tax Projections -- IT20**
 - Cannot export
 - **Depreciation Schedule -- IT31**
 - Cannot export
 - **SS4 - 2553 - 56 Tax Forms -- IT75**
 - Cannot export
 - **Employment Tax Forms -- IT77**
 - Cannot export

Create New Client > Documents With Graphics >

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Ltd. Liability Company

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Client Communications** -- LL01
 - C1.1=1
 - C1.2=1 AND O2.1=1
 - C1.3=1 AND N3.4 is not blank
 - **Articles Of Organization** -- LL02
 - C27.1=1
 - **Certificate Of Organization** -- LL03
 - C27.1=1 (state is IL)
 - C35.1=1 (state is CA)
 - **Securities** -- LL50
 - C1.3=1
 - C1.4=1
 - C1.5=1
 - C1.8=1
 - C1.1=1 AND O33.7=0
 - C1.6=1 AND O33.7=0
 - **Miscellaneous Documents** -- LL80
 - C1.2=1 AND N11.2=35
 - C1.3=1 AND N11.2=35
 - **Minutes** -- LM03
 - None
 - **Operating Agreement** -- LO03
 - None

Probate

Probate

- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **Copy From Estate Planning** -- PB03
 - None
 - **Client Communications** -- PB04
 - C1.1=1
 - C1.2=1 AND O18.1=1
 - C1.3=1 AND O17.1=1
 - C1.4=1 AND N70.4 is not blank
 - **Probate Schedule** -- PB05
 - None
 - **Open Estate** -- PB10
 - None
 - **Creditor Documents** -- PB25
 - None
 - **Miscellaneous Documents** -- PB30
 - None
 - **Sale Of Property** -- PB40
 - None
 - **Death Tax Returns** -- PB55
 - Cannot export
 - **Attorney / Fiduciary Fees** -- PB80
 - None
 - **Close Estate** -- PB90
 - None

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Real Estate

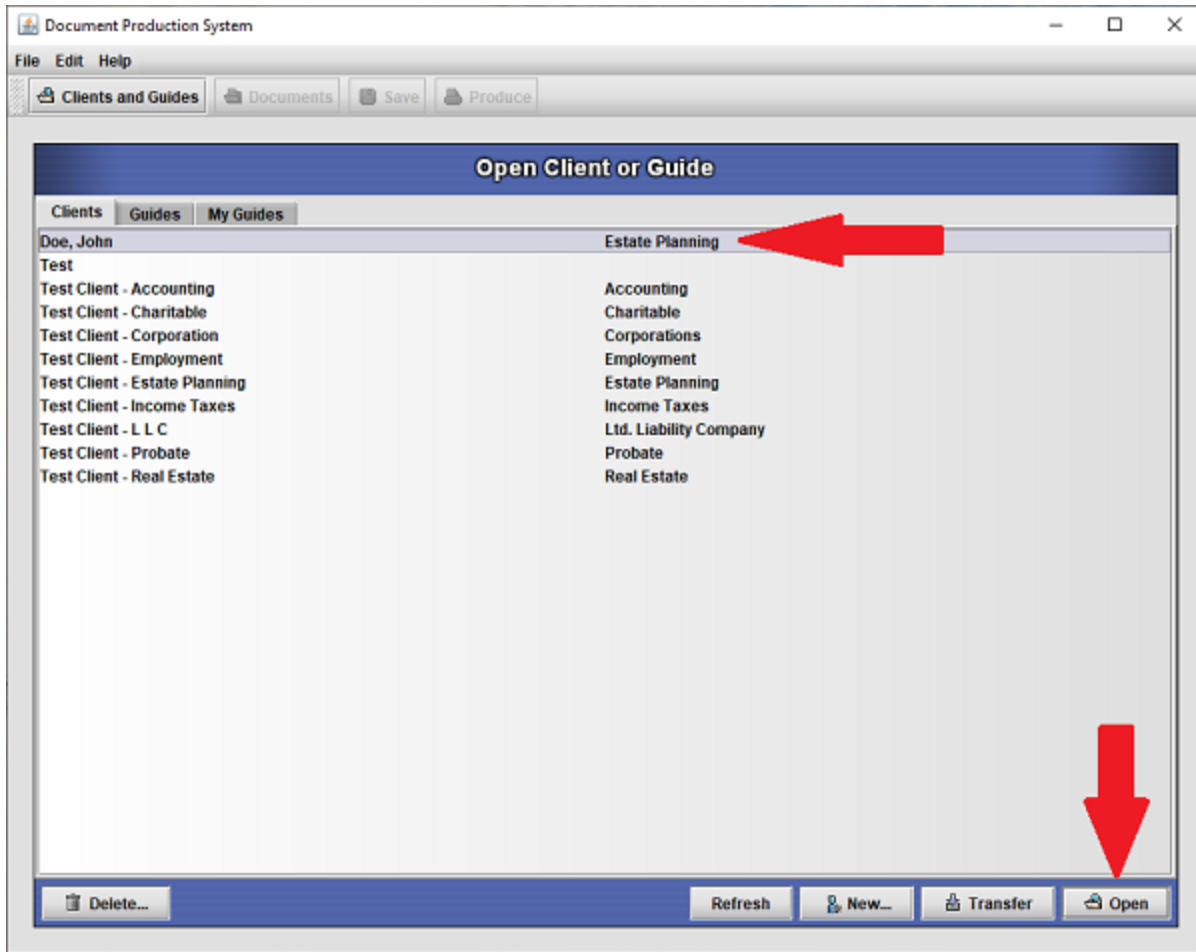
- The following screens in the following documents will produce graphic elements and stop exporting to a word processor:
 - **HUD / Settlement Statements - RE11**
 - C1.1=1
 - C1.2=1
 - **Deeds - RE12**
 - Cannot export
 - **Purchase Agreements - RE15**
 - None

Create New Client > Documents With Graphics >

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Open Client

- After Login select the client to be revised on this Open Client Or Guide screen then click Open.

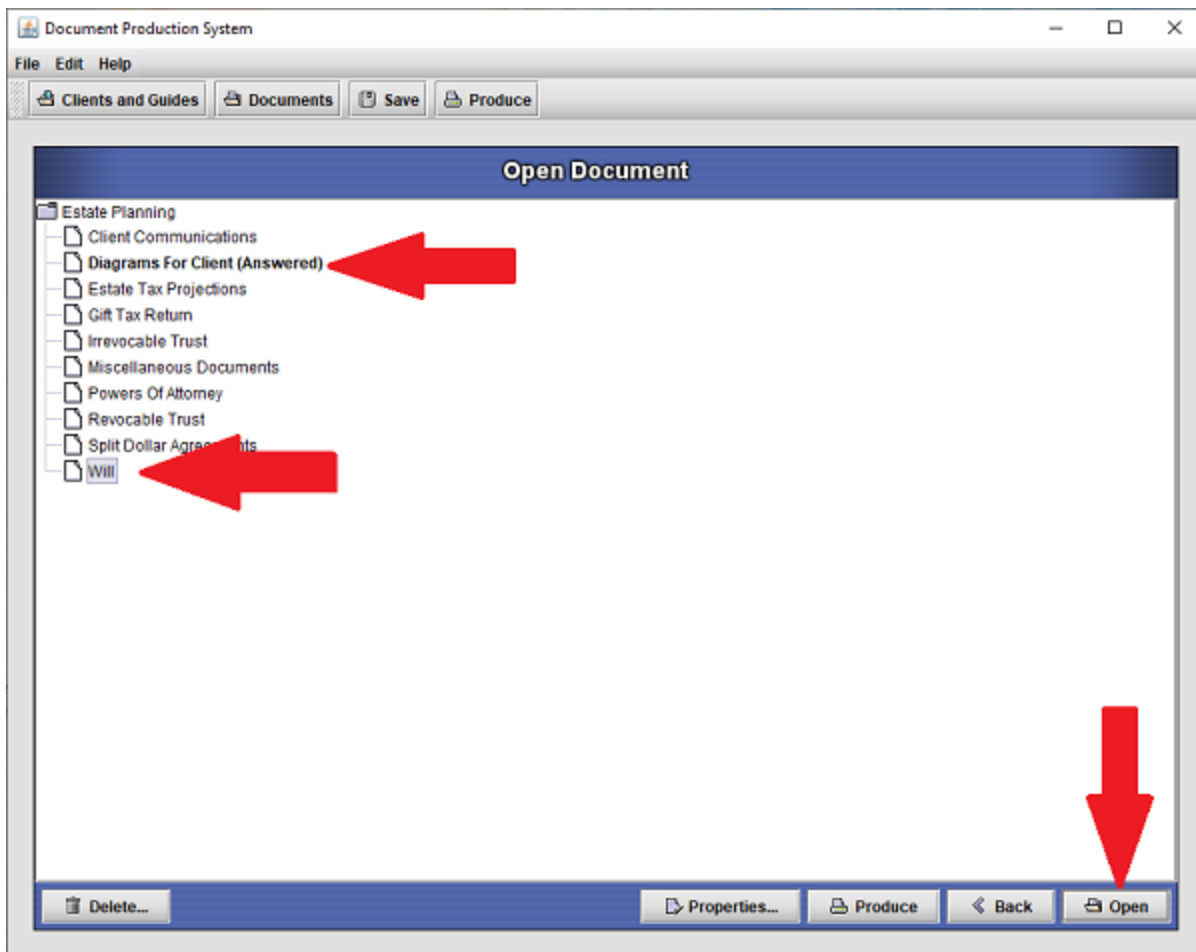


Revise Existing Client >

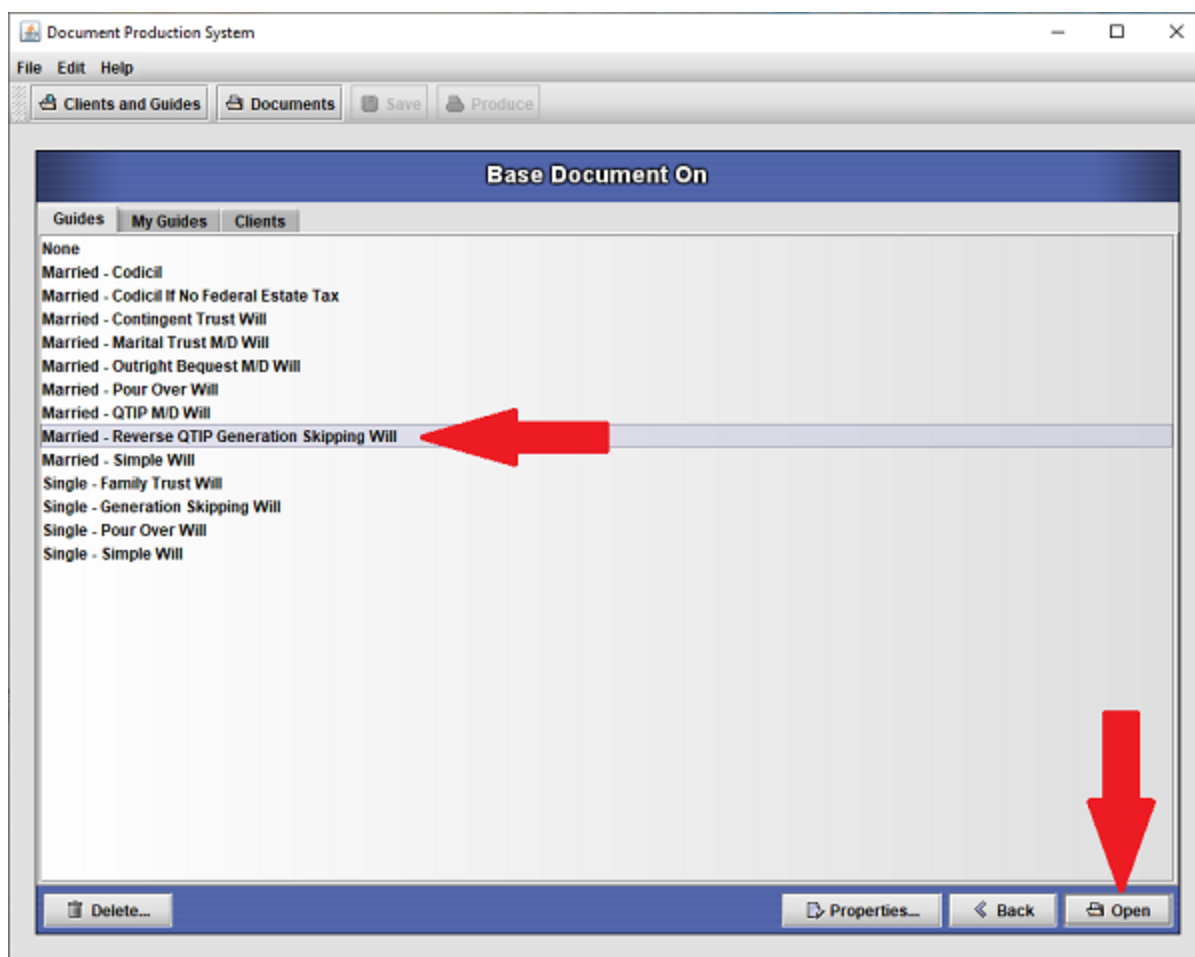
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Open Document

- Select an existing document to revised or select a new document in this Area of Law on this Open Document screen then click Open.



- If a new document was selected, select a Guide on this screen then click Open. The Guide will fill in many of the screens with the correct information for the document.



Revise Existing Client >

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Modify Information

- Enter the information requested on each of the screens. If modifying an existing document go to the screen to be changed by clicking on Outline. If finished modifying screens, click on Finish to go to the Produce screen.

The screenshot shows a web application window titled "Document Production System". The menu bar includes "File", "Edit", and "Help". Below the menu are four buttons: "Clients and Guides", "Documents", "Save", and "Produce". The main content area has a header with "Doe, John" on the left and "Will - N109" on the right. The title "Testator" is centered. Navigation buttons "Back" and "Next" are at the top. The form contains the following fields:

- Name Of Testator**: Input field with "John A. Doe", a "REQUIRED" label, and a document icon button.
- Street Address**: Input field with "100 Main Street".
- County**: Input field with "Polk".
- City**: Input field with "Des Moines".
- State**: Input field with "Iowa", a "REQUIRED" label, and a document icon button.

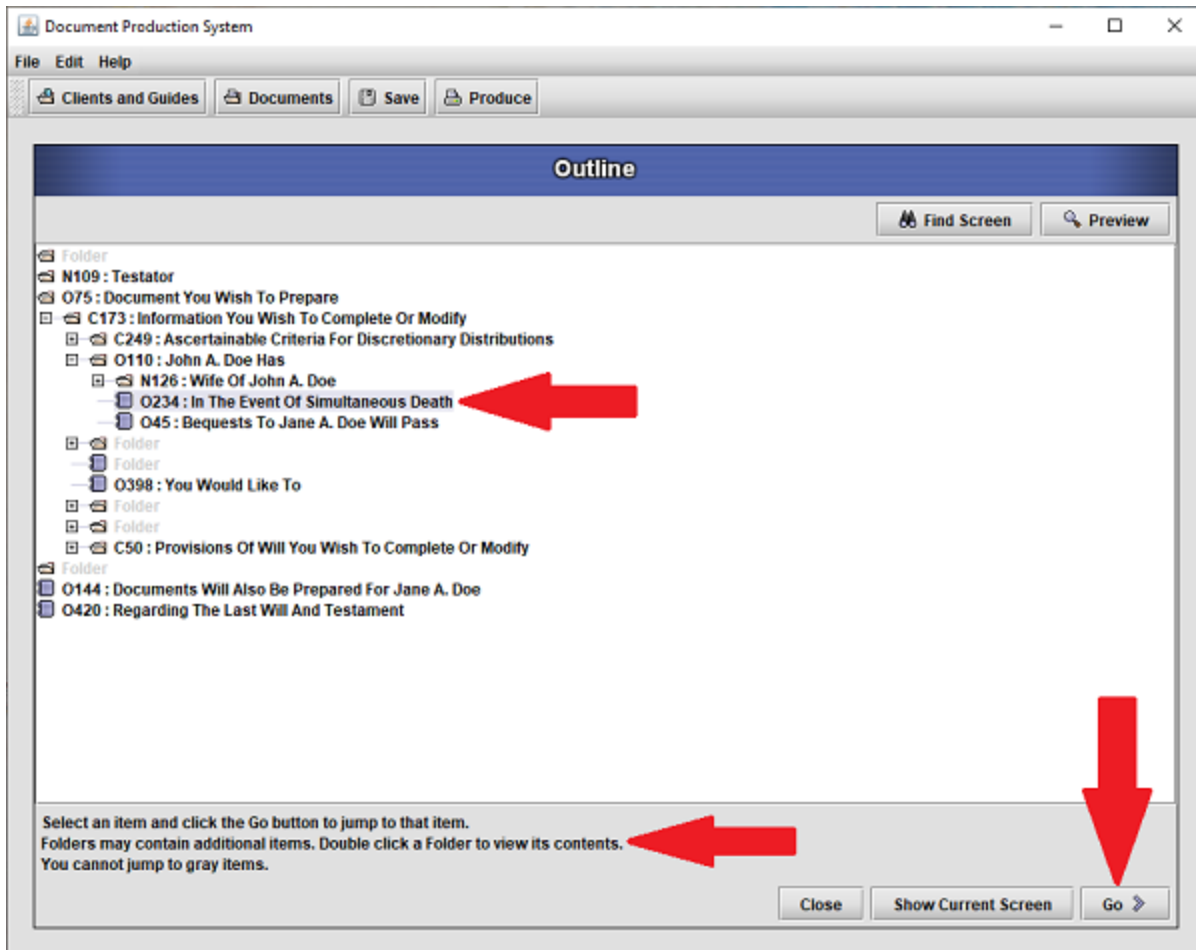
At the bottom, there are two buttons: "Outline" (with a document icon) and "Finish" (with a right-pointing arrow). Two large red arrows point down to these buttons.

Revise Existing Client >

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Outline

- On the Outline screen select the screen to be modified then click on Go. Click on Preview to see the screen selected. Click on Find Screen to select a particular screen. Tips are shown at the bottom of the Outline screen.

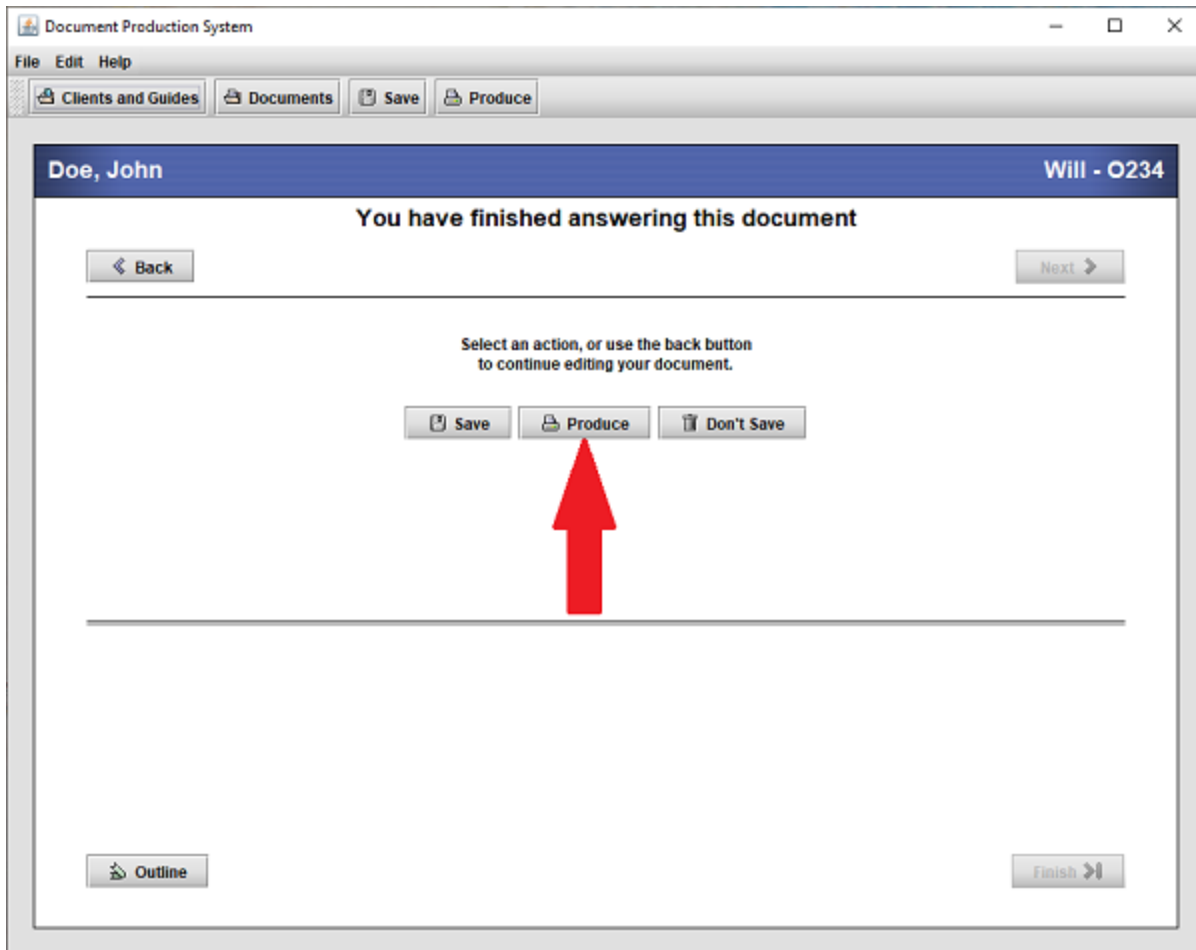


Revise Existing Client >

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Produce Document

- Click on Save to save this client file. Click on Produce to produce the document.
- You can also:
 - produce a document by opening it and clicking the Produce button on the toolbar or
 - produce from the Open Document window by selecting a document and clicking the Produce button.



- When producing the document if some required information is missing this screen will appear. Click on Answer to complete the missing information on the selected screen.. The missing information will be filled with a Line, ***** or ??????? as indicated. Click on Continue to produce the document.

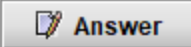
Missing Information

These screens in your document have not been answered.
If you want to answer a screen, click on it and select the Answer button.

Note: Some required fields used for calculations have been left blank. You should examine your produced document to find these missing fields.


Screens:



- N270.1.1 - Name Of Trust
- N280.1.1 - Name Of Original Trustee # 1 (Leave Blank If No More)
- N312.1.1 - Name Of Beneficiary # 1 (Leave Blank If No More)
- N439.1.1 - Age Of Decendant



Select a method of filling in missing fields:

Lines ***** ??????



- If a document which has missing information is produced, it will contain the method shown on the previous screen.

Article VI
Bequest Of Residue

I give, devise and bequeath the residue of my estate as follows:

A. An amount equal to any exemption from generation skipping tax available under Section 2631 of the Internal Revenue Code, as amended, reduced by any part of the generation skipping exemption available to my estate under the Internal Revenue Code which has been allocated to other transfers made by me, including other transfers provided for in this Last Will And Testament, as follows:

B. All to John A. Doe Revocable Trust.

C. Bequests pass to a beneficiary's heirs if he/she does not survive.

D. The balance of the residue to the ?????? (hereinafter sometimes called a Residual Trust)

Article VII
??????



I bequeath the assets of the ?????? to ??????, as Trustee, to be administered as follows:

A. After this ?????? is established:

B. After the death of my Wife, if she survives me:

C. After the death of the survivor of myself and my Wife:

D. Upon the death of the survivor of myself and my Wife, the Trustee shall divide the ?????? as follows:

1. All to ??????.

Why does it tell me my “document is empty” when I try to Produce it?

- You are probably working in an area that requires you to “check off” which documents or forms you would like to have Produced. Use the Outline to help you look for sections or screens where you can specify this information.

Why is my tax form printing out too small?

- Check your Acrobat Reader settings. Use File, Print and then check all three boxes in the middle on the right of the Print Window. You'll notice that one of these boxes says “Expand Small Pages To Paper Size”.

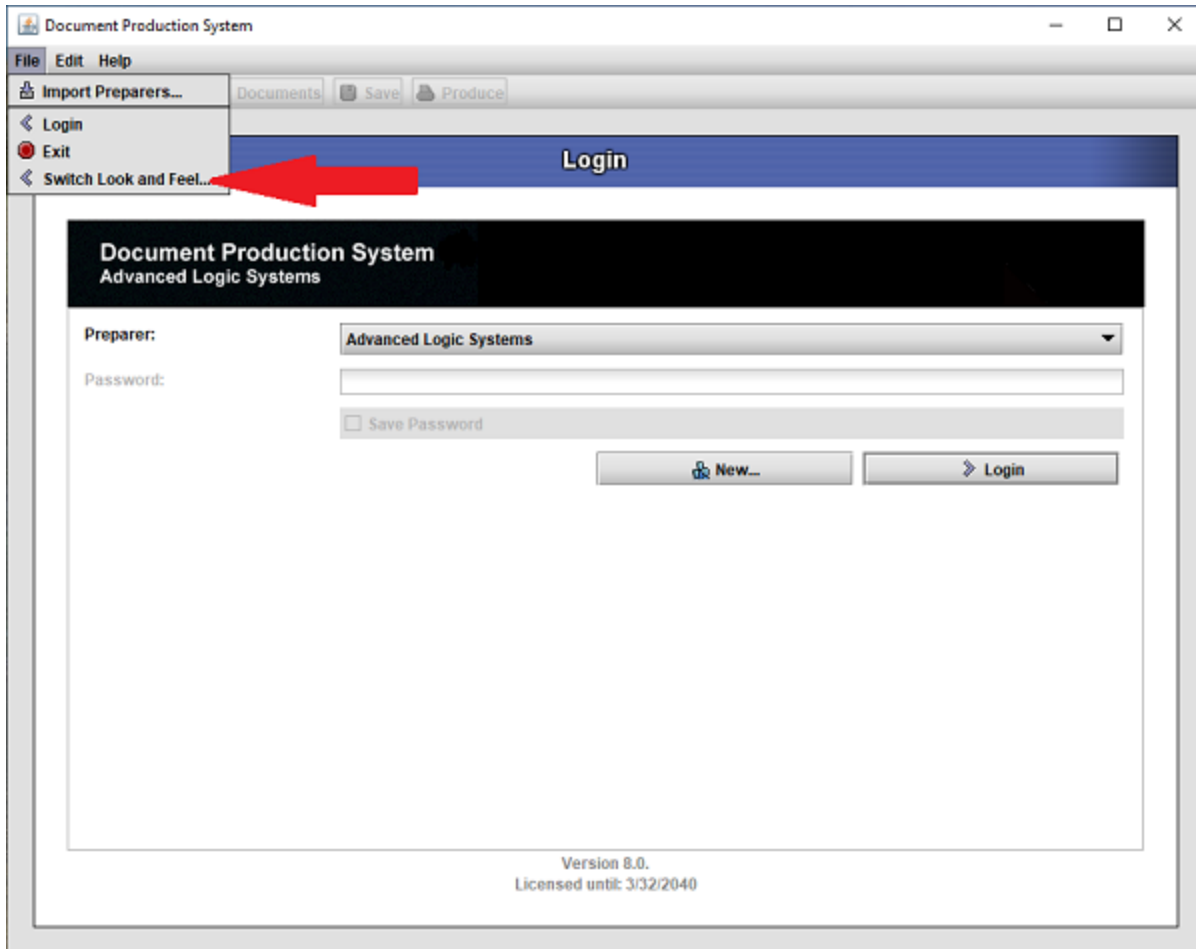
Revise Existing Client >

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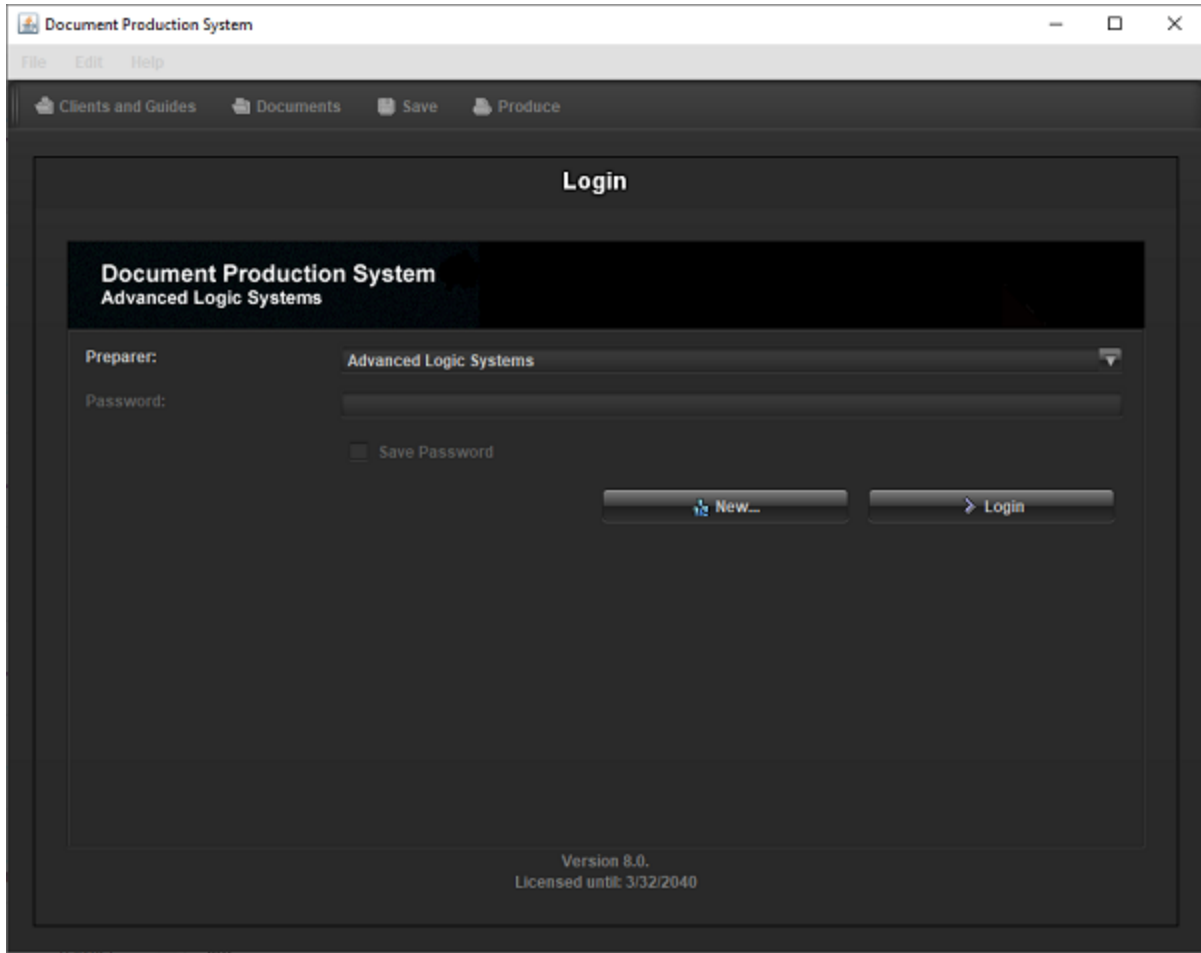
Classic and Dark Look and Feel

- On the login screen you can change the look and feel of DPS 8 between Classic Look and Dark Look by selecting File then Switch Look and Feel.

Classic Look



Dark Look

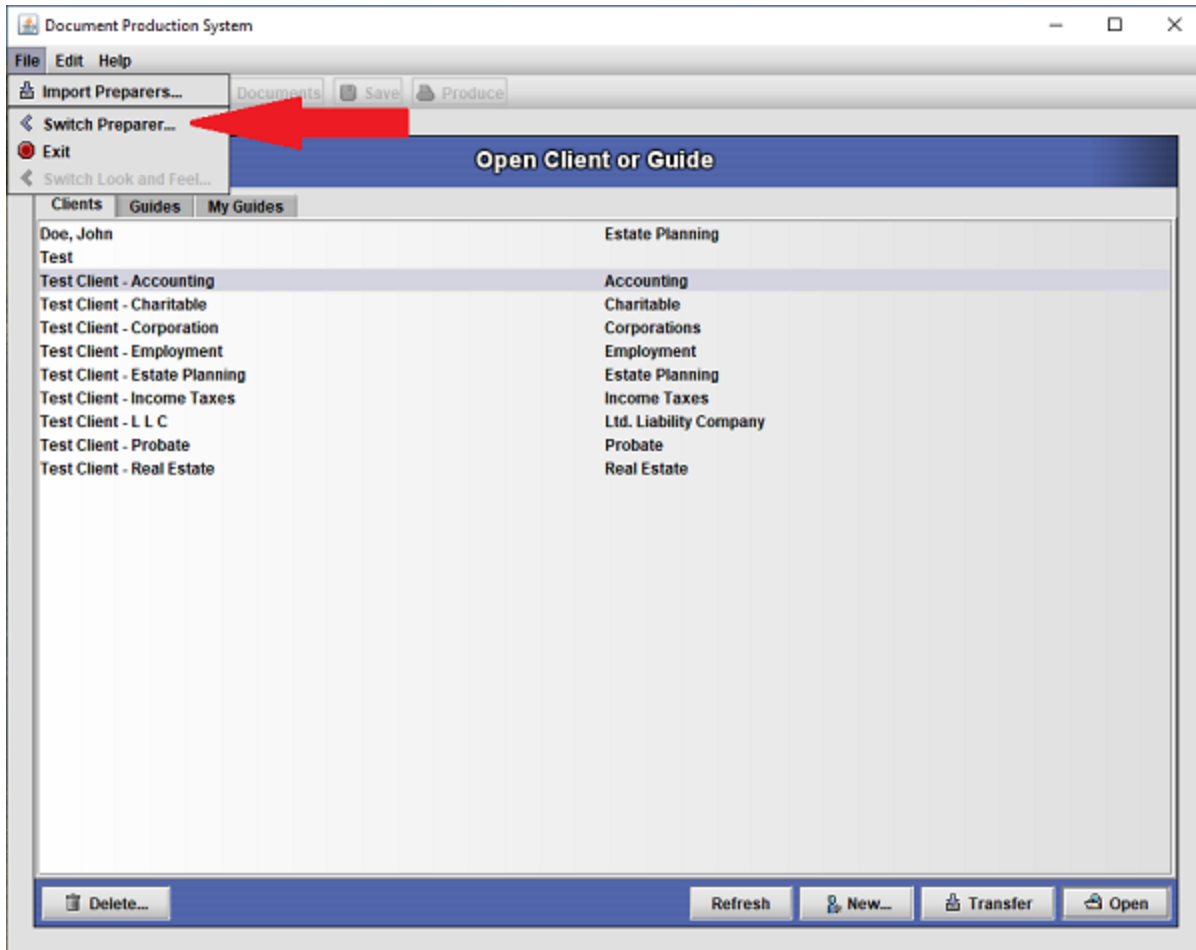


Customize DPS >

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Switch Preparer

- After logging in you can switch preparers by selecting **File then Switch Preparers**.



Customize DPS >

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Firm Information

- Click on **Edit then Firm Information** to enter the information regarding your firm. This will be used by some Documents to fill in the information on screens to save you typing.



The image shows a screenshot of a software dialog box titled "Firm Information". The dialog box has a blue header bar with the title "Firm Information" and a close button (X) in the top right corner. Below the header, there are several input fields for firm details:

Firm name:	Brown and Associates				
Address:	558 28th Street				
City:	Des Moines	State:	Iowa	Zip:	50312
Phone:	515-282-7703	Fax:	515-282-7706		
Tax ID:	12-3456789				

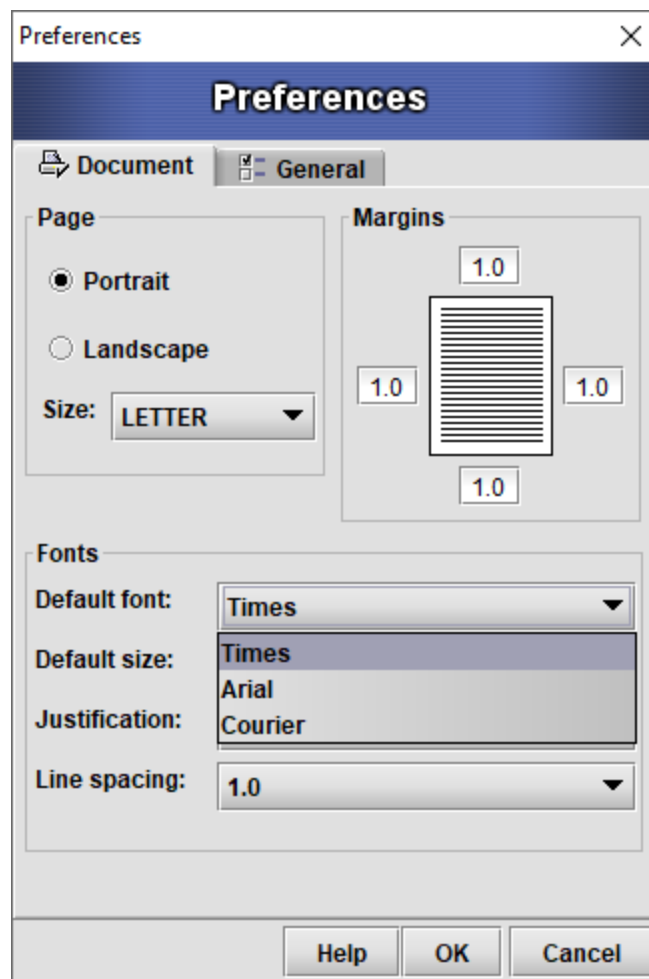
An "Ok" button is located in the bottom right corner of the dialog box.

Customize DPS >

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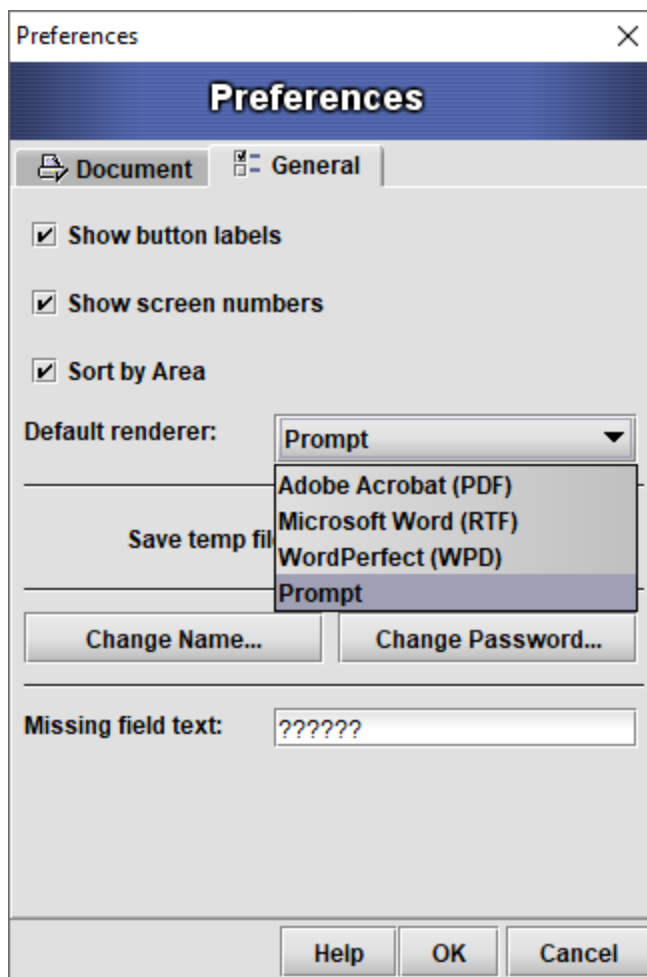
Preferences

- The preferences dialog allows you to change settings related to your preparer. To access it, select Preferences from the Edit menu. The preferences dialog is divided into two sections, **Document** and **General**.
- **Document Tab**
- Click on Edit then Preferences then Document tab to set how your documents will be formatted. Certain DPS 8 documents (such as forms) will change this formatting if needed.
- The document tab lets you change default document formatting settings. You can change the page size and layout, margins, and fonts. Documents, including forms, may override your font settings.
 - **Page** designates your default page size and orientation.
 - **Margins** designates your default page margins in inches.
 - **Fonts** designates your default fonts, justification, and line spacing.



- Click on **Edit then Preferences then General tab** to set the way DPS 8 will work.
- **General Tab**

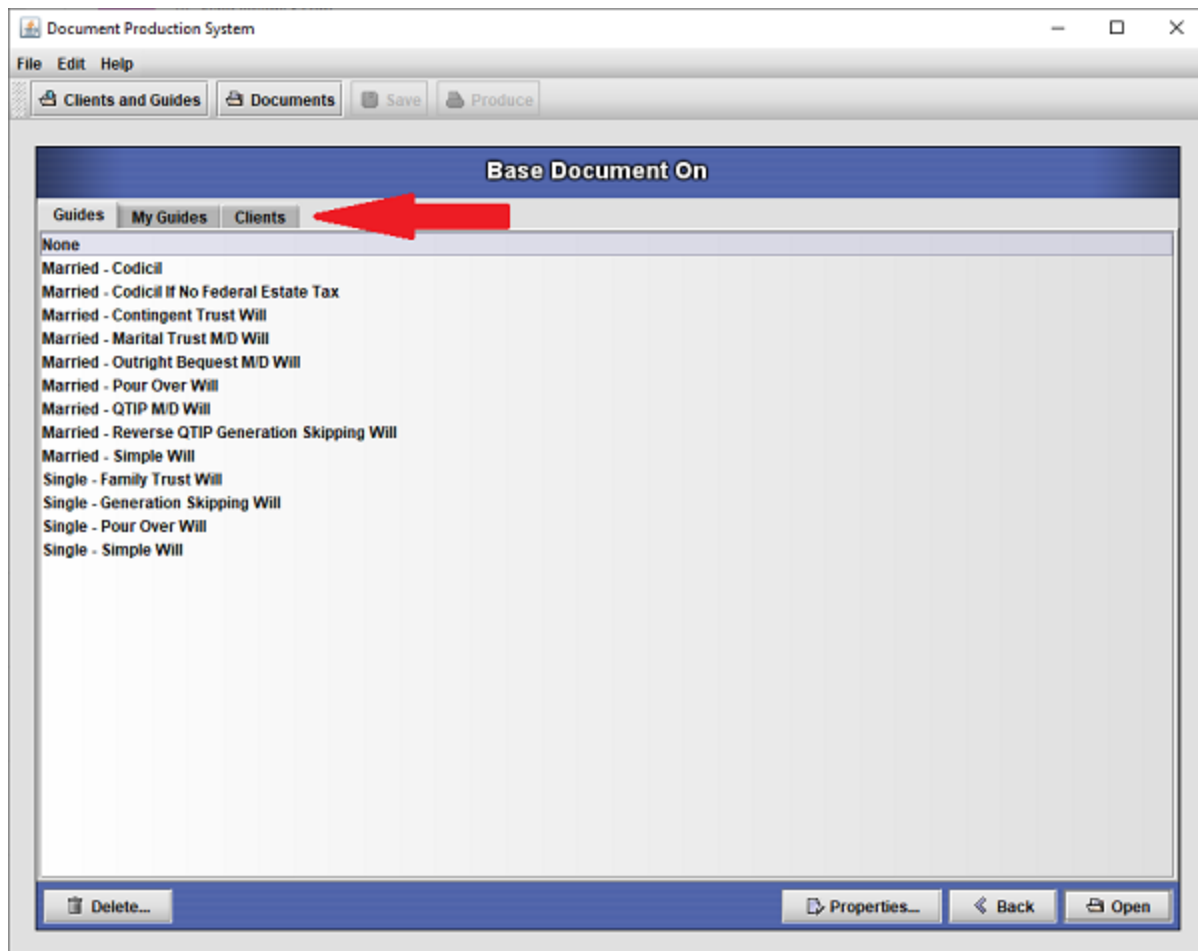
- The general tab contains miscellaneous settings and lets you change your preparer name or set a password.
- **Show button labels** enables or disables labels on the toolbar buttons
- **Show screen numbers** displays screen numbers as you are answering a document. The screen numbers show in the upper right portion of the blue title bar. This is mainly used for support purposes.
- **Default renderer** lets you choose a default document renderer. By default it is set to "Prompt," which causes DPS 8 to ask you each time you produce a document. You can leave it on Prompt, or set it to your preferred document format.
- **Save temp file** -- DPS 8 automatically saves a temporary client file every 10 screens. You can increase or decrease the saving frequency here. This protects you from losing work in the event that DPS 8 exits unexpectedly.
- **Change Name** allows you to change your preparer name.
- **Change Password** allows you to set a password that must be entered before you login.
- **Missing field text** -- Any text you enter here will be used when a document contains information you have not yet entered.
- We suggest that the General tab be filled in as shown below.



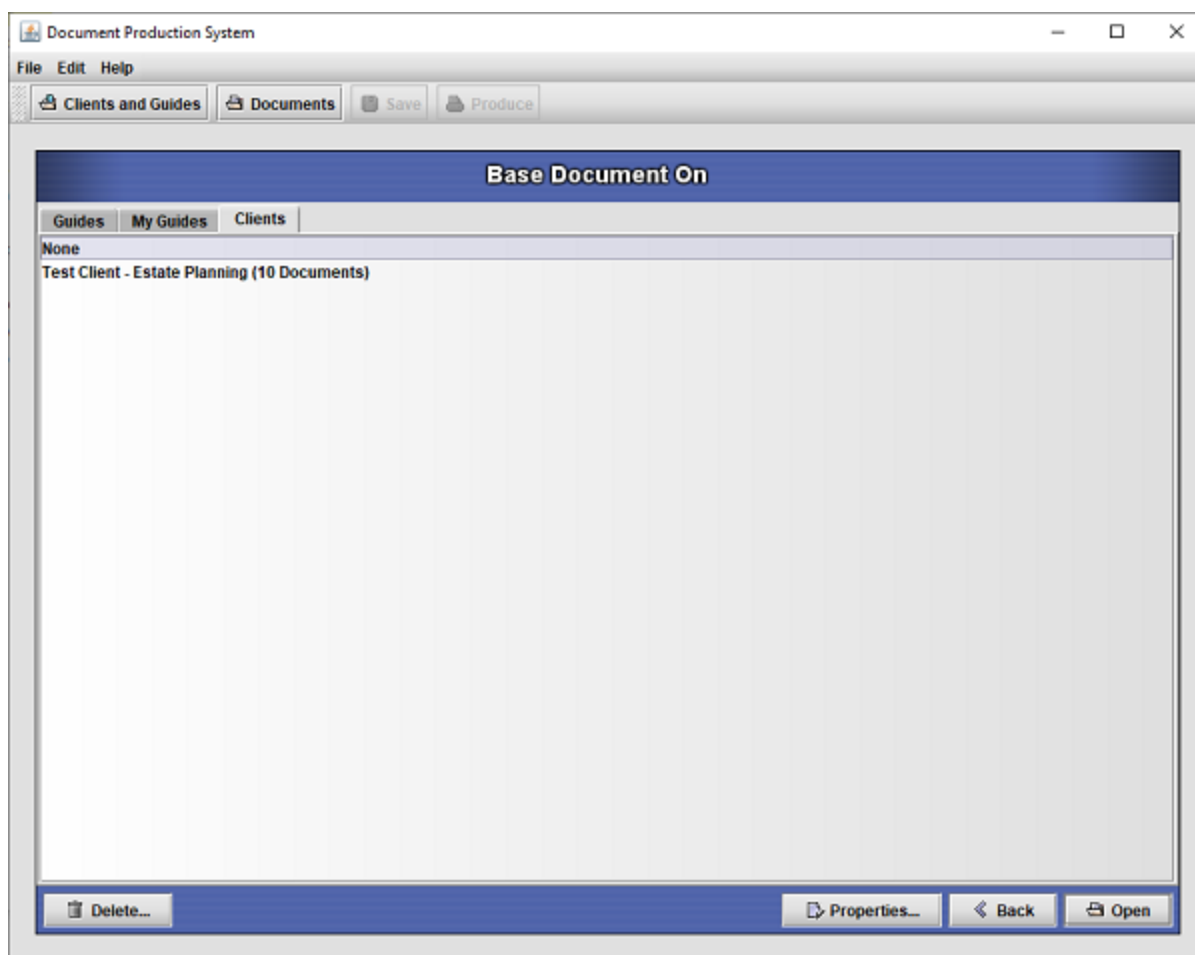
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Working with Guides

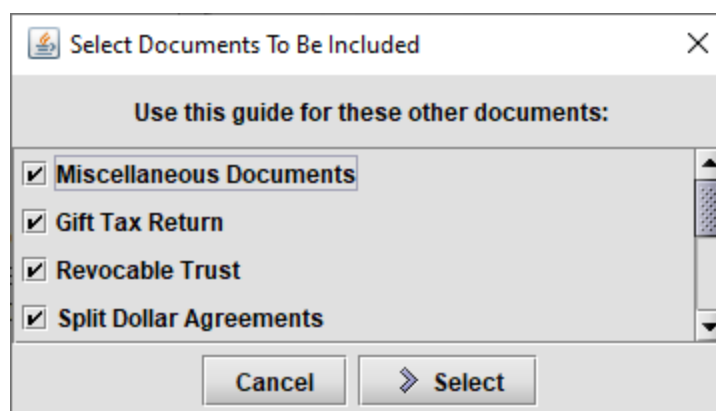
- When you create a new document, you are asked to choose the guide that most closely reflects the document you want. A guide is a set of default answers which can be changed if necessary. Using a guide will improve your efficiency substantially because most of the information DPS 8 needs is already entered. If everything on a screen is correct, all you have to do is click on Next. Thus, it takes very little time to create a new document when you use a guide that contains the correct information. You can select "None" if you do not want to use any of the guides listed.
- The **Guides Tab** displays the names of guides that are available to any preparer. A large variety of guides are provided with DPS 8.



- The **Clients Tab** displays a list of the client files already created by the current preparer. You may use any of these client files as a guide for a new document. If your current requirements closely match some previous work, using the previous client file as a guide provides you with a custom guide. This technique is particularly useful when creating Estate Planning documents for a spouse.



- The number of documents contained in the previous client is shown in parentheses. Select which documents which should be used as guides for this client.



- The **My Guides** Tab displays guides that were created by the current preparer and are only available to the current preparer. A guide is created in much the same way as a document. One difference is that information specific to a client, such as names and addresses, is left blank. The second difference is a strategy that involves answering some questions several different ways so that you are permitted to answer sets of later questions, which are shown only under specific conditions. For example, you might want to create a guide for producing a Will for a married person whose assets fall below \$11,000,000. You might want to provide for the spouse to receive the lesser of the Optimum Marital Deduction or 50% of the Adjusted Gross.
 - You can create your own custom guides for DPS 8. One reason to do this would be to edit in the names and addresses of the people who witness Will executions for the office.
 - To do this, first log in. Instead of selecting a client to open, switch to the Guides tab. Right click on any guide

that you would like to add the names to and choose Add to My Guides.

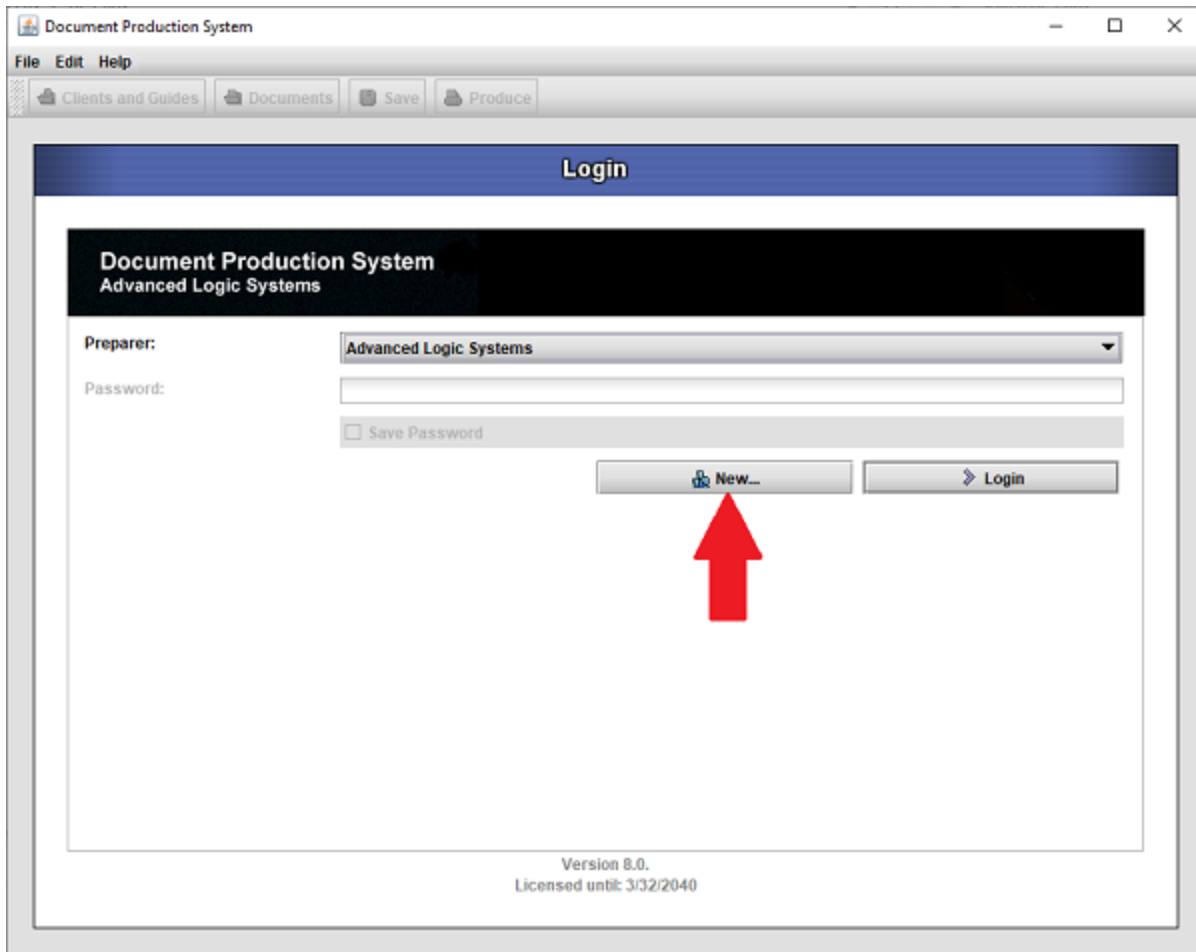
- When you're done selecting guides to work with, switch tabs to My Guides. Select each guide in turn, Open it and edit in the names/addresses then Save. The names will pre-populate whenever you use your guide and you can erase if someone is going to be gone on the day the Will is executed.

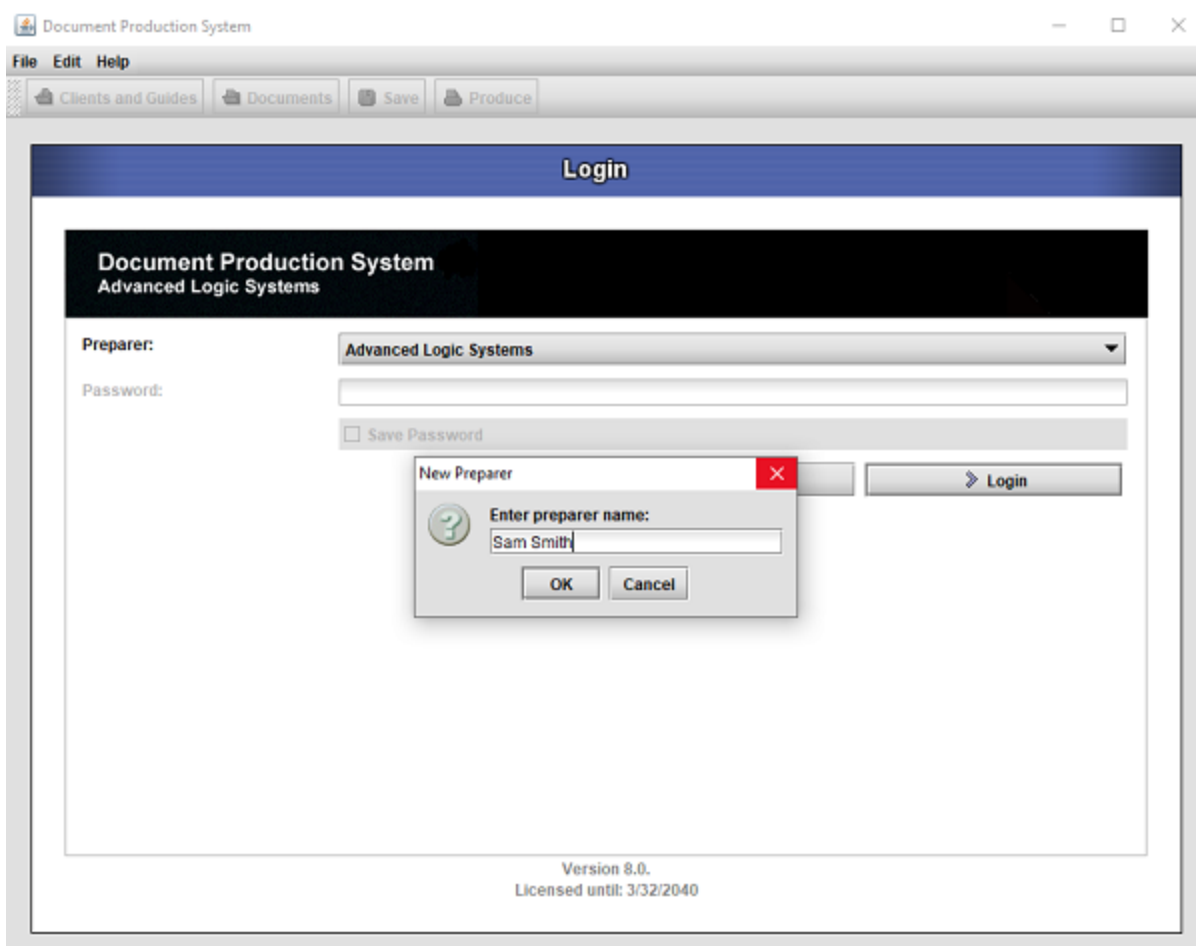
Customize DPS >

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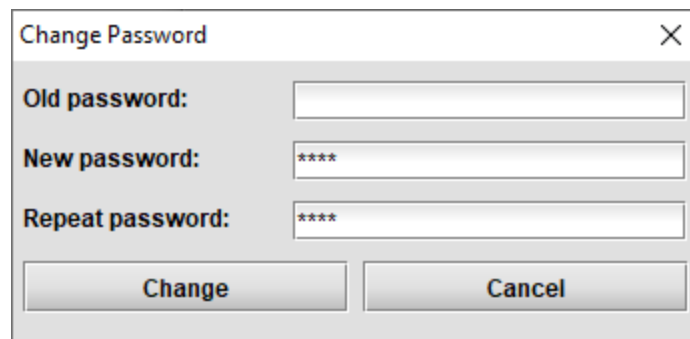
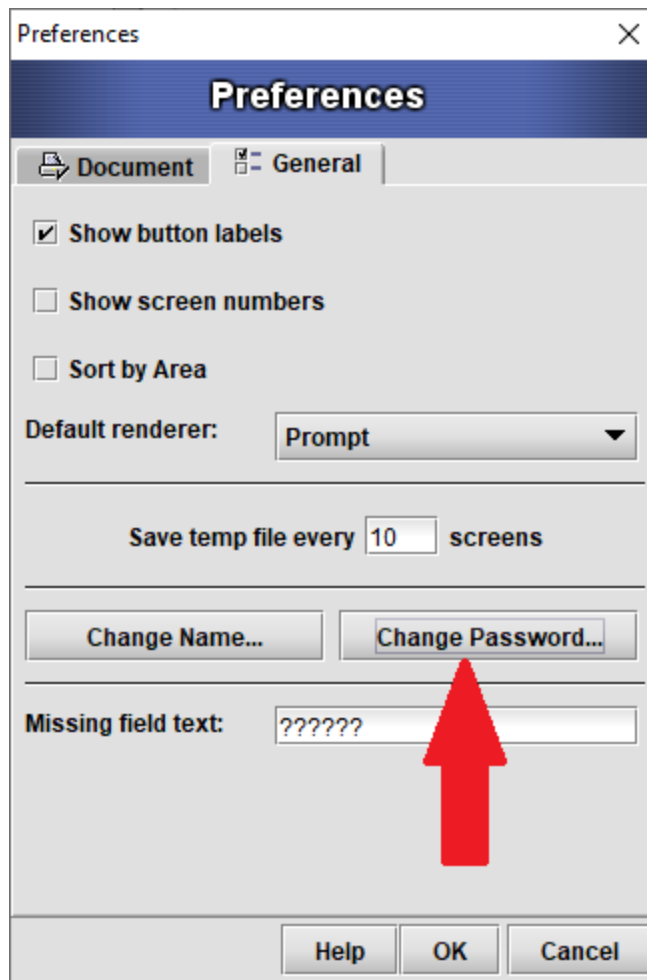
Preparers

- Preparers represent different users of the same installation of DPS 8. When starting DPS 8 you must login by selecting your preparer from the list.
- To Add a Preparer
 - To add a preparer, click New. DPS 8 will prompt you for the name and create the preparer.

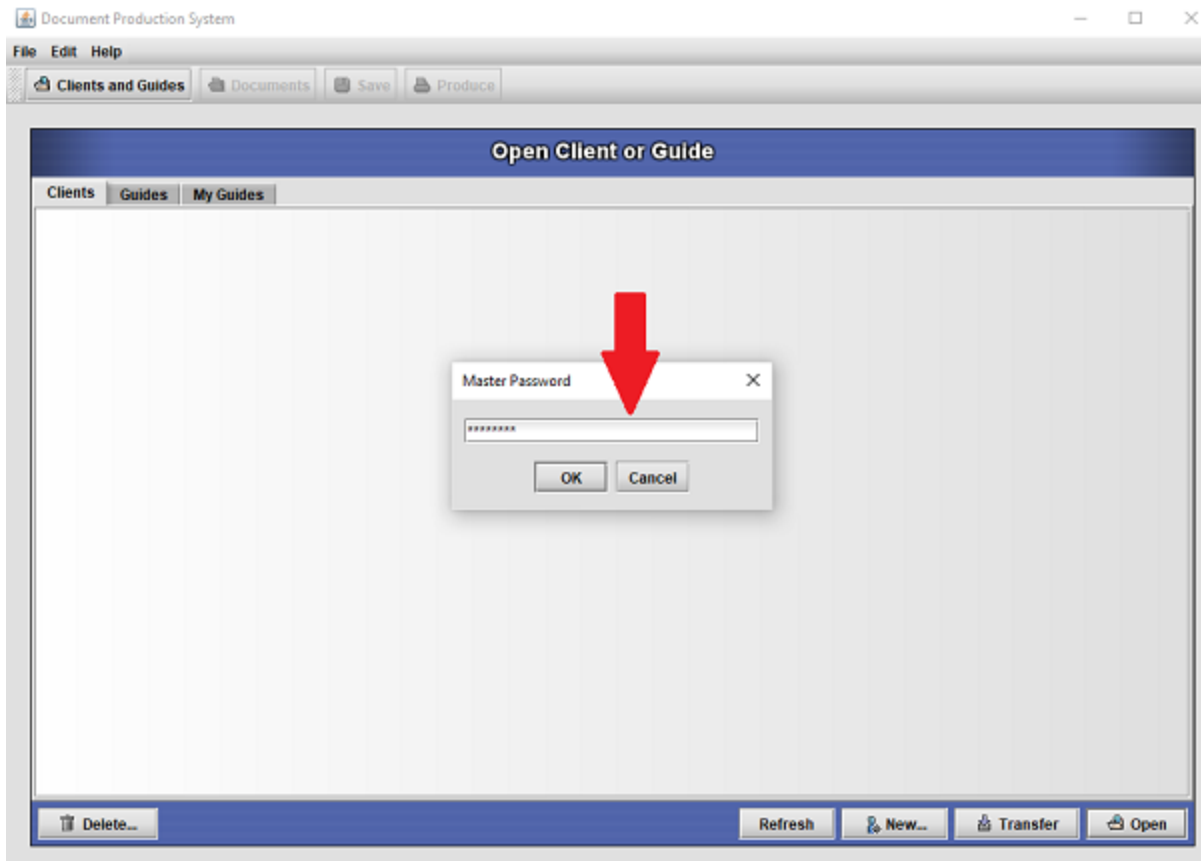
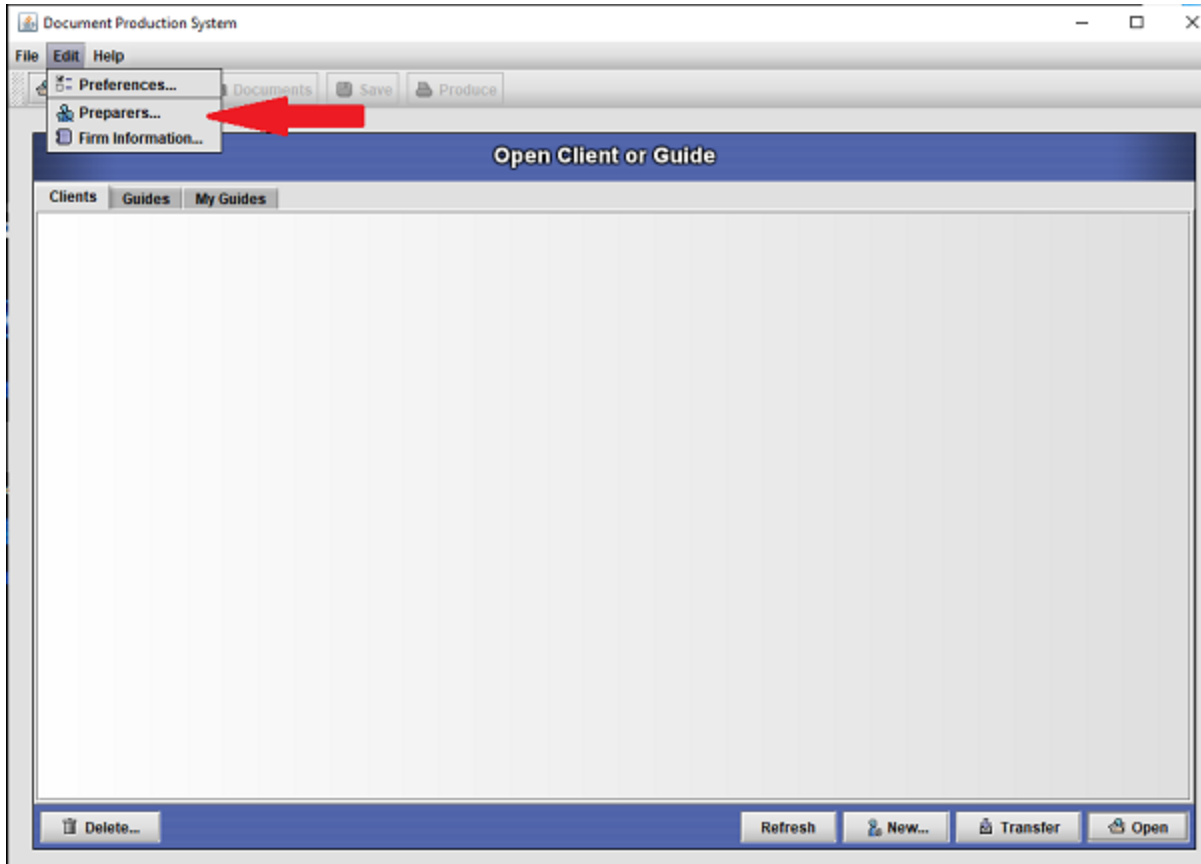


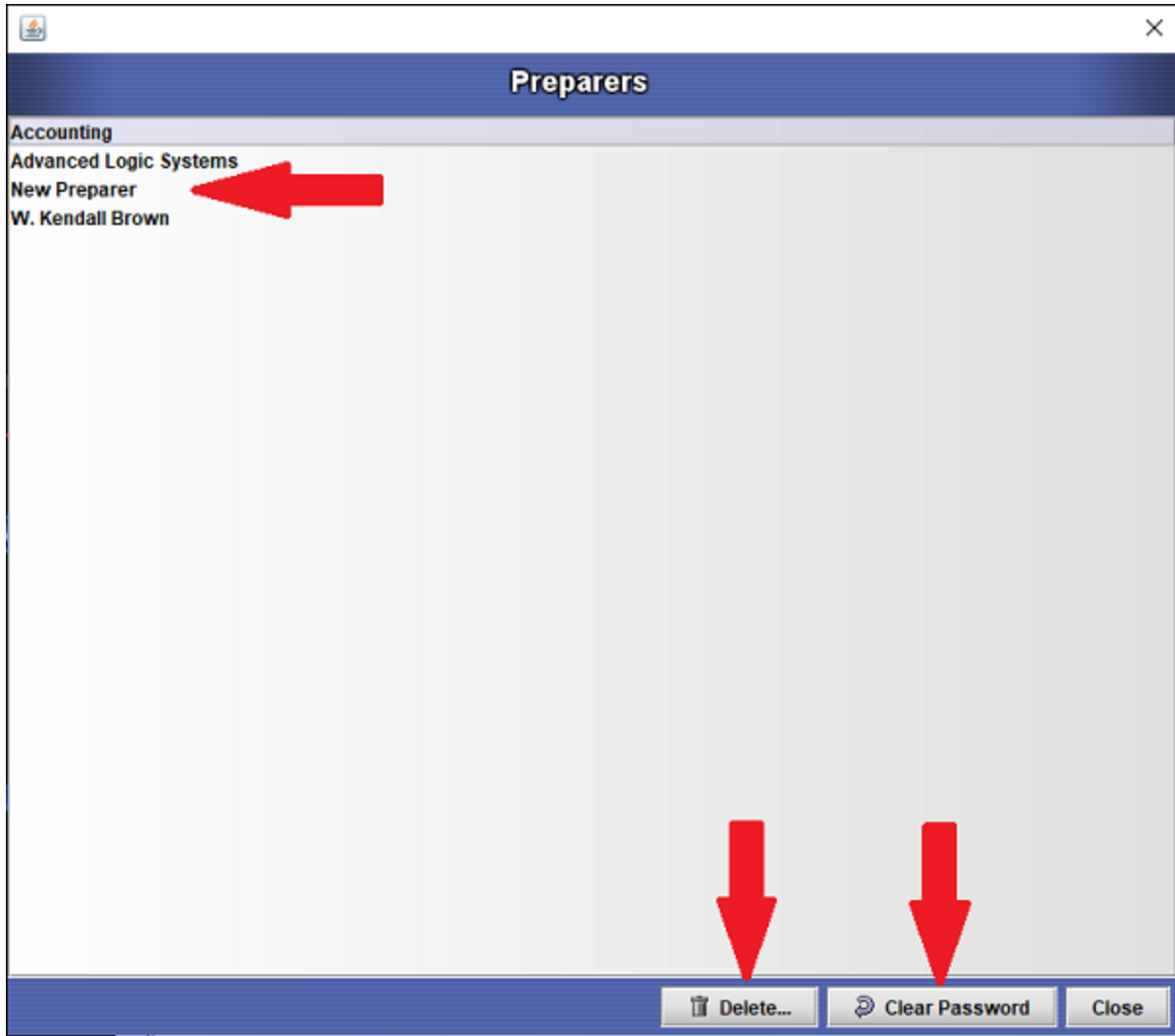


- To create a password for a preparer login as that preparer and **click on Edit then Preferences then General tab then Change Password**. Leave Old Password blank and enter the new password both places where indicated. The name of the Preparer can also be changed by **clicking on Change Name**.



- To delete a Preparer or remove the Password of a Preparer **click on Edit then Preparers**. Enter the Master Password then select the Preparer. That Preparer can then be deleted or the Password of that Preparer can be cleared.



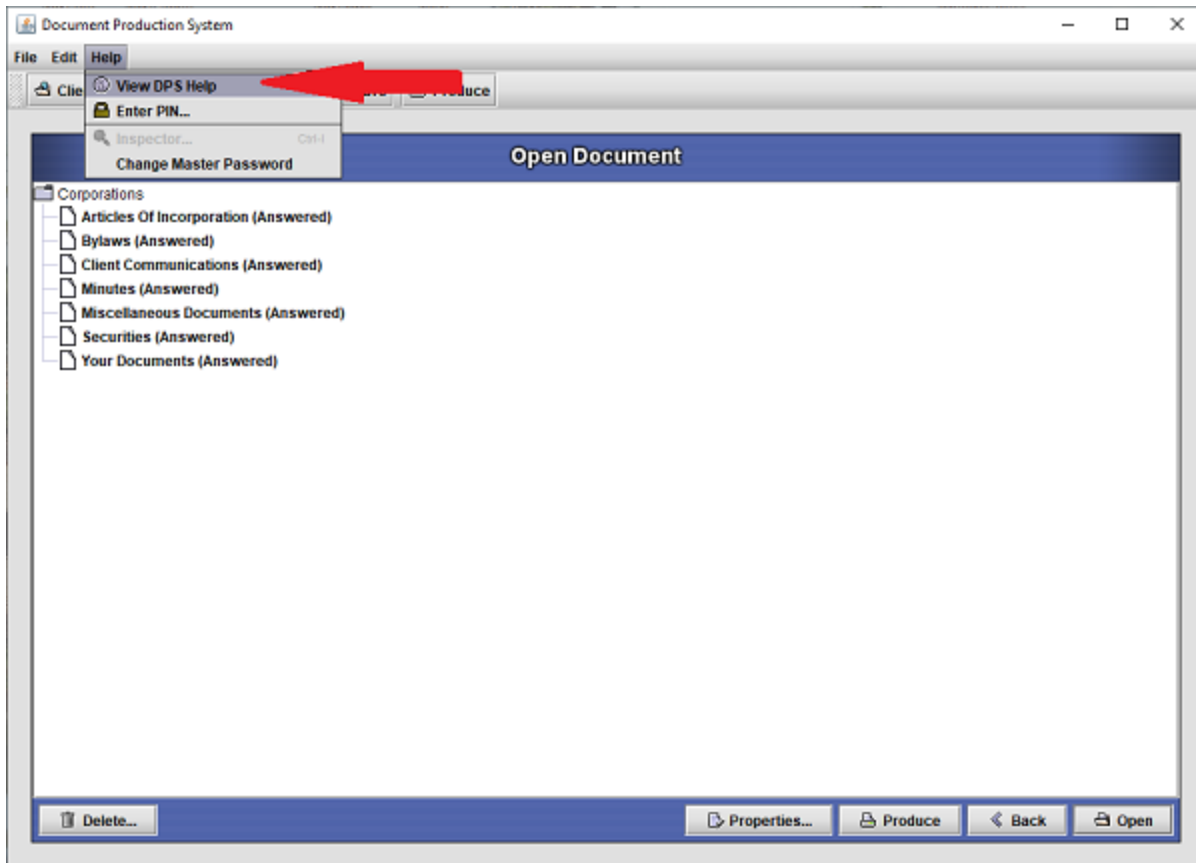


Customize DPS >

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View DPS Help

- After logging in you can view the DPS 8 Help by selecting Help then View DPS Help. The DPS 8 Help file will be displayed as a PDF and can be navigated using the Bookmarks shown on the left.



The image shows a web browser interface. On the left, a 'Bookmarks' sidebar is open, listing various topics. A red arrow points to the 'DPS Installation' folder. The main content area displays a document titled 'Installing DPS If No Existing DPS8'. The document includes instructions and two screenshots of a web form. The first screenshot shows a 'Downloads' section with three buttons: 'Download DPS8', 'Download DPS8 (USB)', and 'Download DPS8 (USB)'. Red arrows point to the first two buttons. The second screenshot shows a 'Get New DPS' form with fields for 'Name', 'Address', 'City', 'State', 'Zip', 'Phone', and 'Email'. Red arrows point to the 'Phone' and 'Email' fields.

Bookmarks

- Introduction
- ✓ DPS Installation
 - > Installing DPS If No Existing DPS8
 - > Installing DPS If Have Existing DPS8
- > Updating DPS
- > Create New Client
- > Revise Existing Client
- DPS Documents and Guides
- > DPS Features ----

Installing DPS If No Existing DPS8

- Go to <http://www.dps8.com/dps-downloads.php> and click on one of these 2 boxes

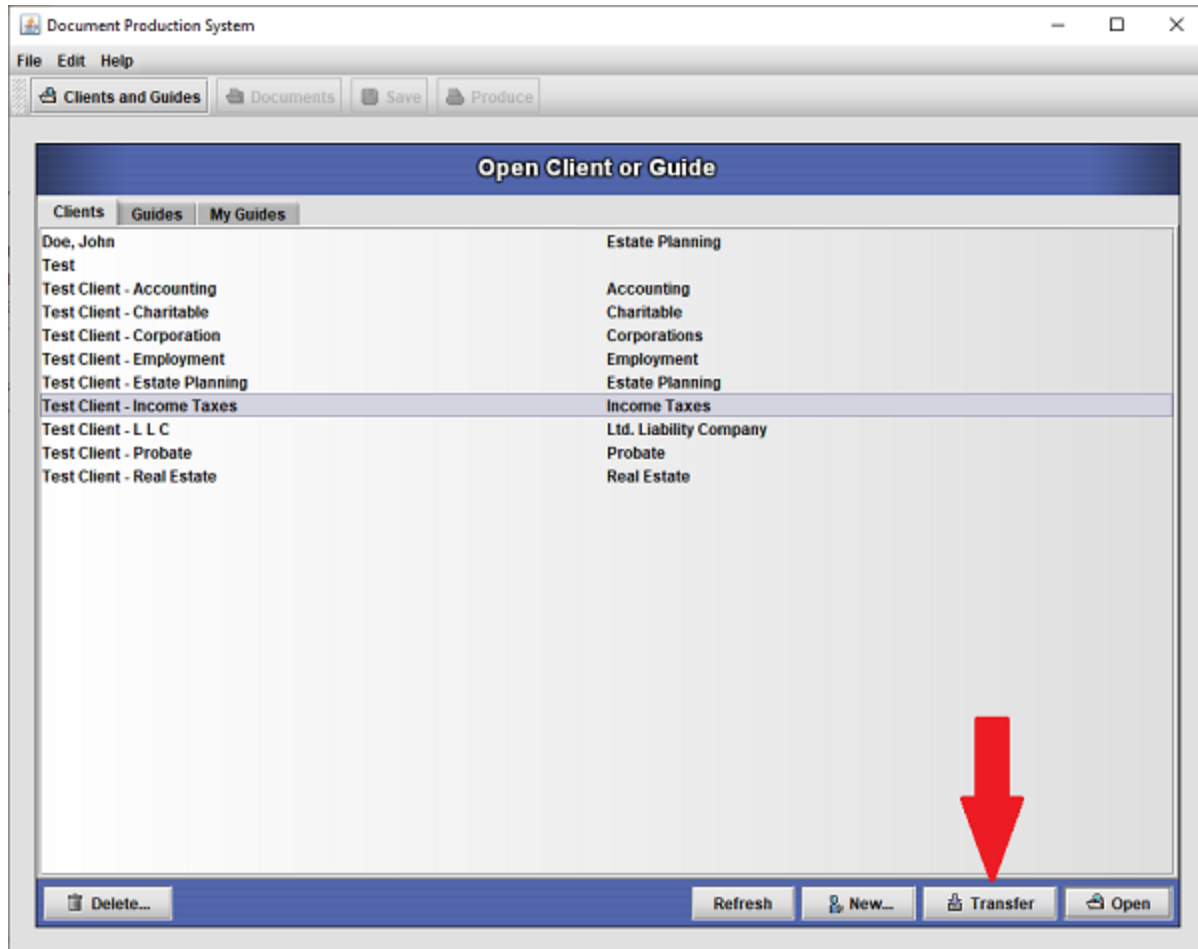
- Fill out the following form, select either a Download or Receive USB and click on Continue

Customize DPS >

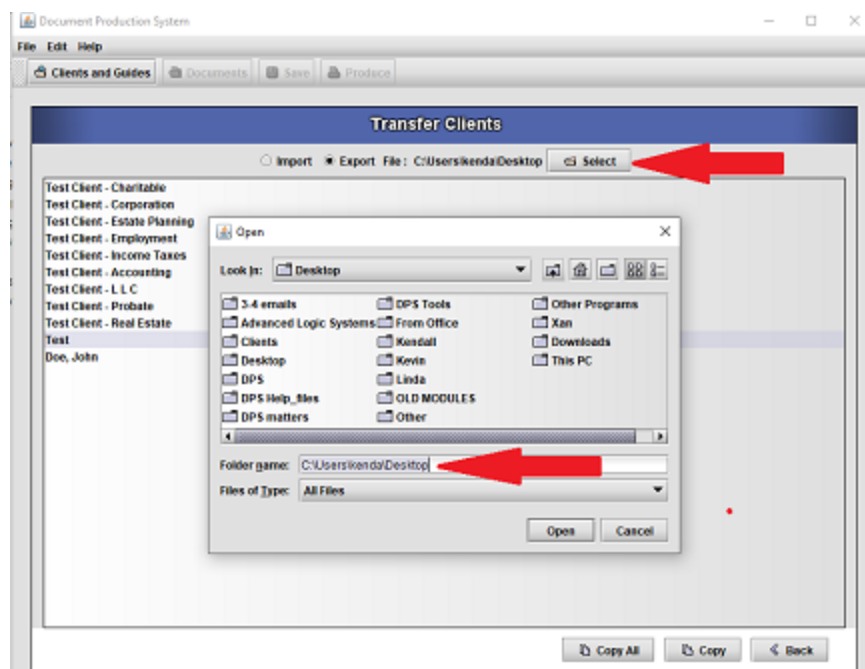
[Click here](#) to send comments on this topic.

Export DPS Client Files

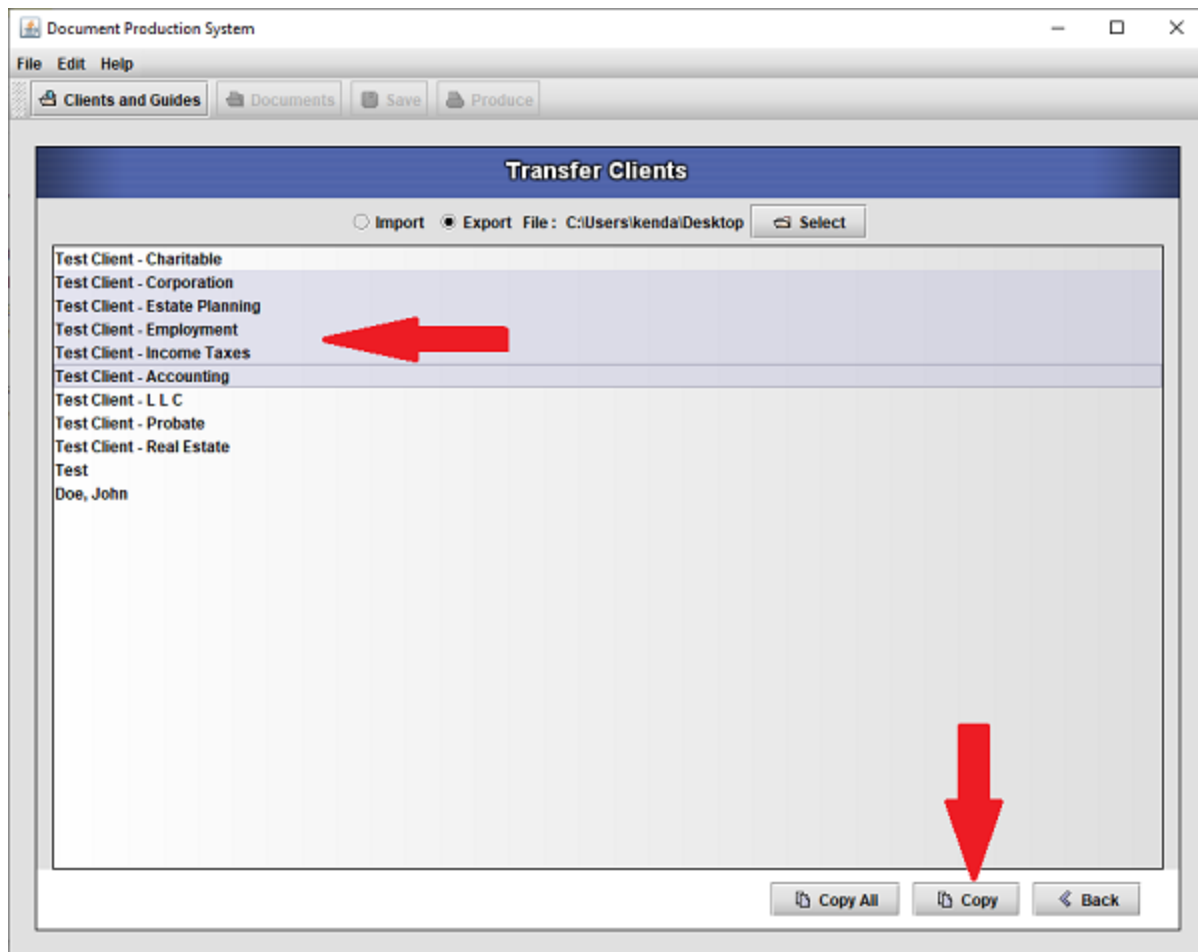
- On the Open Client or Guide screen click on Transfer to start the export.



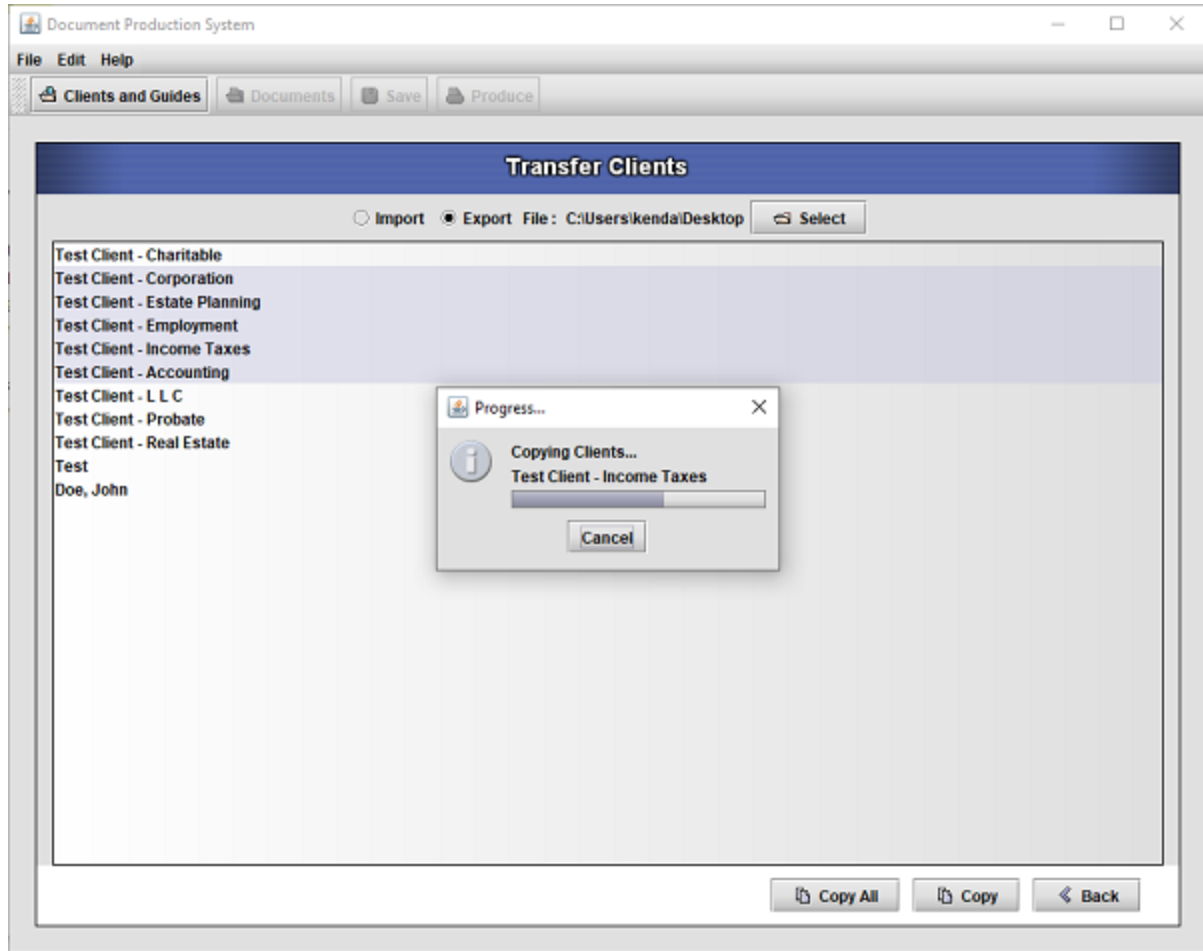
- On the Transfer Client screen click on Select to select where your client(s) are to be exported. Navigate to the correct folder (in this case the Desktop.) **The default location for the export is the clientExport folder in your DPS 8 folder.**



- Select the client(s) to be exported. One or more clients can be selected. Click on Copy to export the selected clients or on Copy All to export all of the clients.



- The selected client(s) will be exported and put in a file called client.db That file can be emailed or copied to another location as desired. This file can be saved as a backup of your client files.

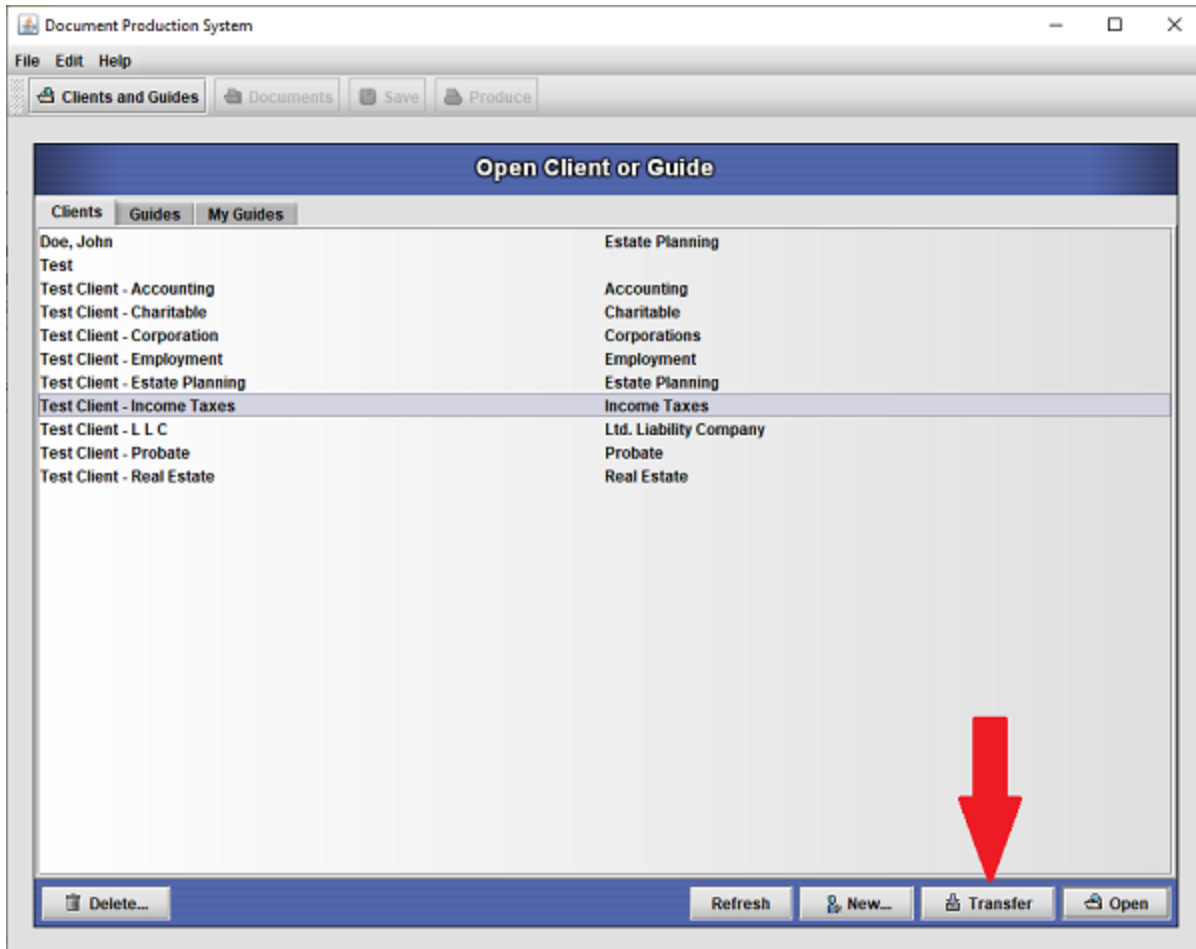


File Managment >

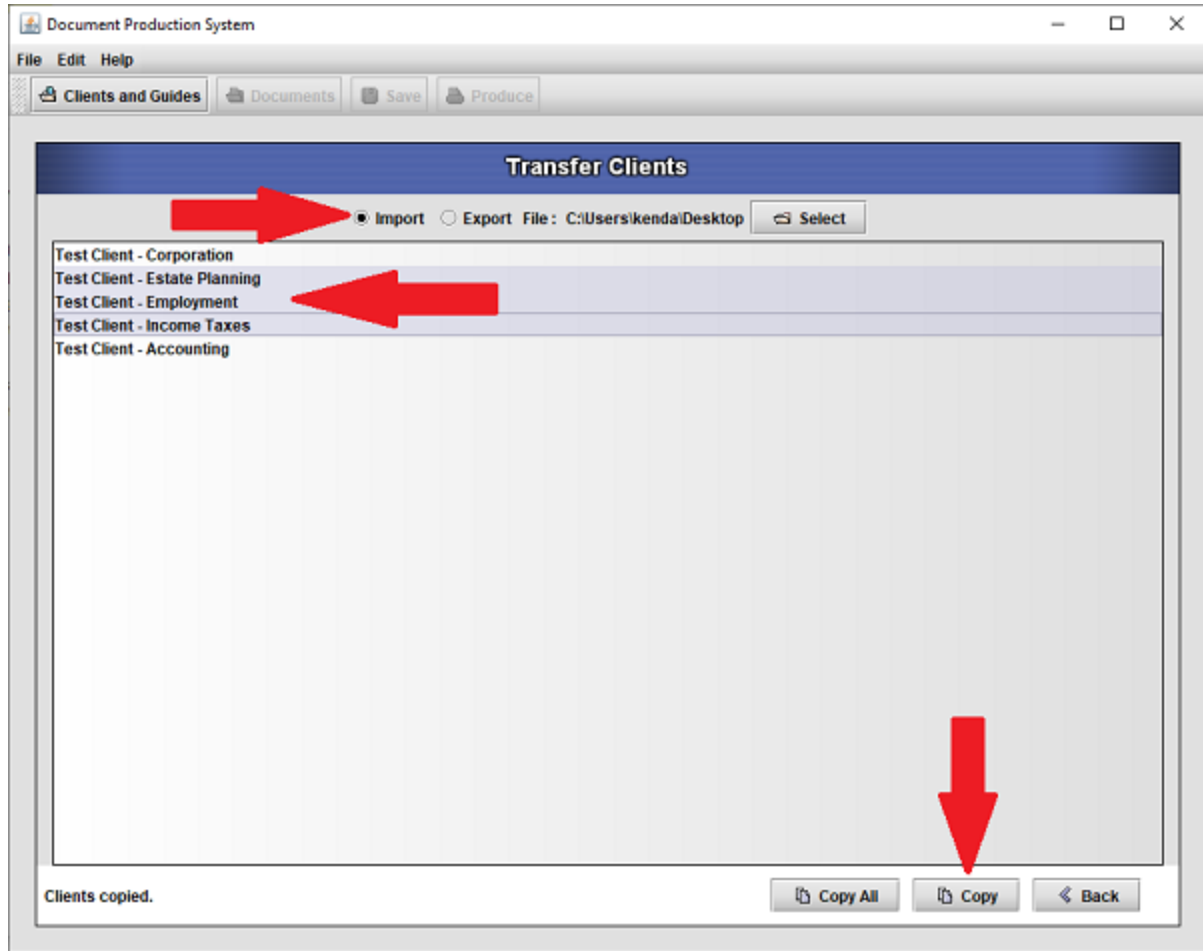
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Import DPS Client Files

- On the Open Client or Guide screen click on Transfer to start the import.



- To import client(s) place the client.db file in the folder selected at the top of this screen. When Import is selected the clients in that file will be shown. Select one or more clients then click on Copy to import the selected clients or on Copy All to import all of the clients.

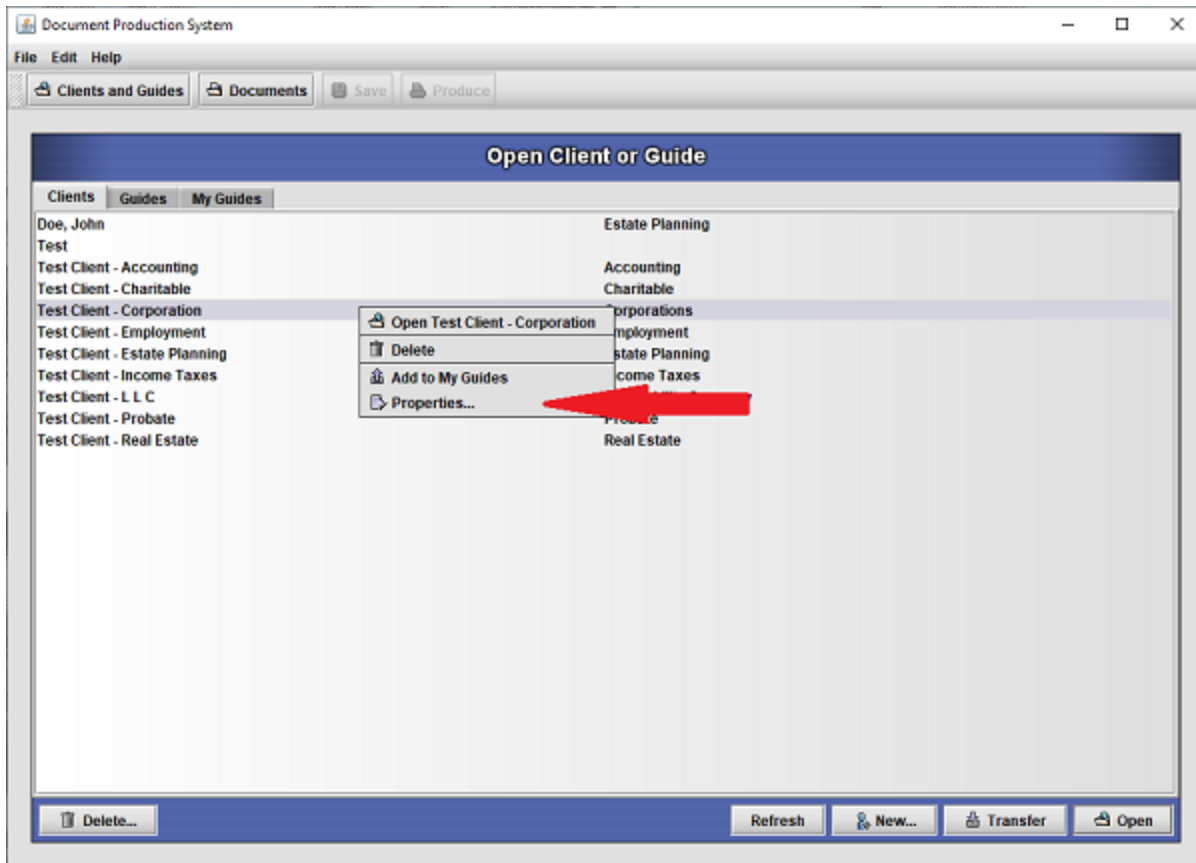


File Managment >

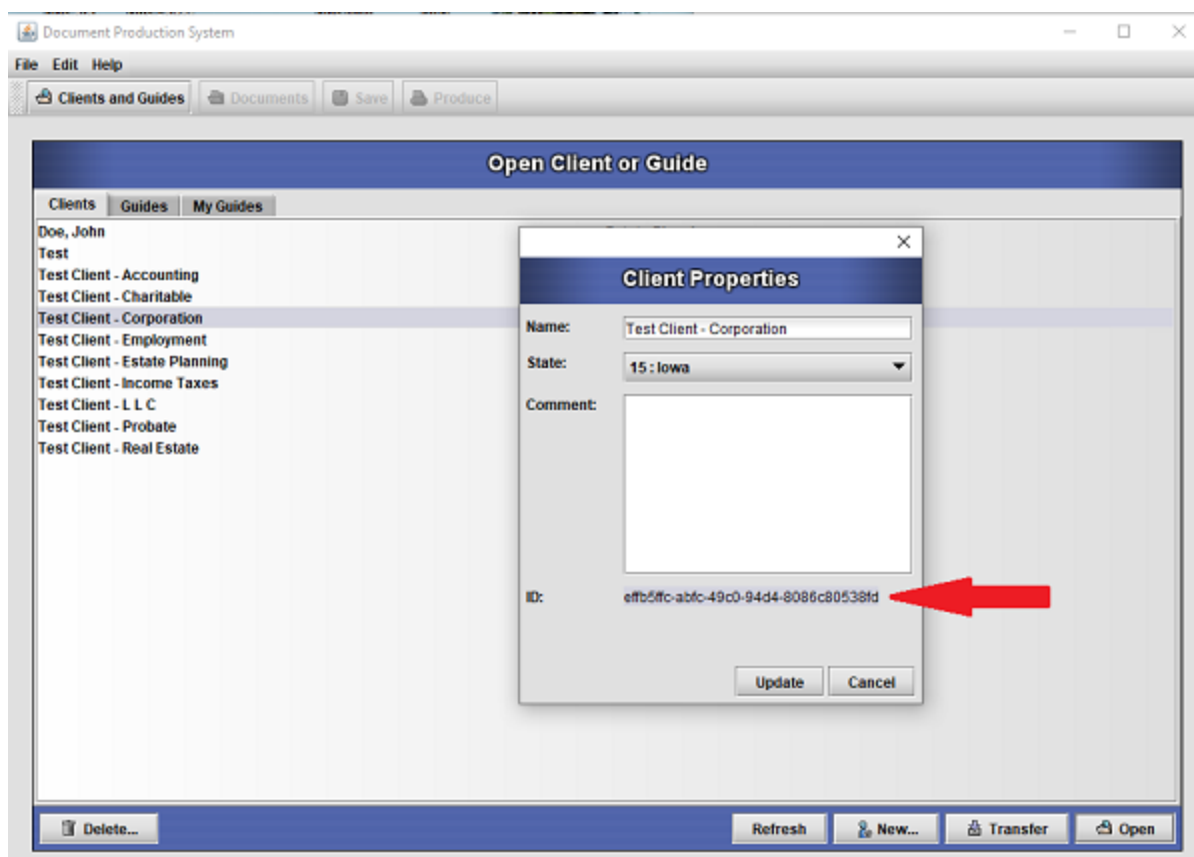
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Client File ID

- To find the ID Number for a client, right mouse click on the Client's name on the Open Client or Guide screen then select Properties:



- The ID Number for the client is shown at the bottom of the Client Properties screen. It can be copied to the Clipboard by double clicking on it and then pasted into a DPS 8 screen or Note Pad as needed.



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DPS Screens

- As you enter information, you may notice DPS 8 using four different types of input screens:
 - T (Text) Screen accepts anything that you type and copies it into your document exactly as entered. You can enter as much text as you want. If you have the text in a word processing document, you can copy and paste it onto a T screen.
 - N (Name/Data) Screen is merely a blank for you to fill.
 - DPS 8 will automatically format your answer. For example, DPS 8 will insert dashes in I.D. numbers, change 1000 to 1,000 and insert a dollar sign in front of monetary amounts.
 - DPS 8 verifies that correct information has been entered. For example, if you are required to enter a numeral as an answer, DPS 8 will check that you have in fact entered a numeral.
 - If you enter information in all lower case letters, DPS 8 will change the capitalization to have a capital letter at the beginning of each word. If you enter any upper letters, DPS 8 will not change the capitalization.
 - If a particular piece of information has been entered for this client in through another document, it is automatically inserted in this document. Any changes to this shared information in one document will also change the information in the other document.
 - After a field that should contain a name, you will find a button that will bring up the name lookup dialog.
 - DPS 8 keeps a list of all of the names previously entered in this clients files. You can use the name lookup feature to fill in a name by clicking on the button to the right of the input line requiring a name.
 - O (Option Button) Screen provides you with a selection and requires you to choose one item.
 - C (Check Box) Screen allows you to check any/all option(s) that are relevant to your document.

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Problems Producing

- **Why does it tell me my “document is empty” when I try to Produce it?**
 - You are probably working in an area that requires you to select which documents or forms you would like to Produce. Use the Outline to help you look for sections or screens where you can specify this information.
- **Why is my tax form printing out too small?**
 - Check your Acrobat settings. Select File, Print and then check all three boxes in the middle on the right of the Print Window. You’ll notice that one of these boxes says “Expand Small Pages To Paper Size”.

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Problems With Totals In Death Tax Returns

- **Why are my totals double what they should be?**
 - When creating a 706 or other Death Tax Form, there are two different ways of entering assets.
 - You can create the schedule using DPS 8 by entering information describing the applicable assets and allow DPS 8 to total the combined value and transfer it to the cover pages as needed, and/or
 - You can use a screen entitled Totals From Attached and merely tell DPS 8 the totals from schedules that you have created outside of DPS 8. DPS 8 will transfer this value to the cover pages.
 - A common mistake is to enter everything and sum it under Totals From Attached. That makes the value used on the 706 exactly double what it should be. If you have made this mistake, you will need to go to outline, identify and change to zero amount on the Attached Schedules, as they are redundant values.

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Transfer Estate Planning Clients to Probate

- To transfer client information from a DPS 8 Estate Planning client to a new Probate client:
 - Get the exact name of the Estate Planning client. Right click on the client file on the Open Client screen and select Properties. Select the client name (example: Doe, John) and hold down the control key while pressing the C key. That will put the exact client name into your paste buffer.
 - Create and Open a new Probate client.
 - Select Probate as the area of law and Copy From Estate Planning as the document.
 - On the first screen, hold down the control key while pressing the V key and you will paste the file name into the blank provided.
 - Choose Next, Next and Save and your Probate client will be ready for use. Selecting Produce will create the following report:

The following information has been copied from the Estate Planning file -- Doe, John into this Probate file -- Test for John A. Doe, deceased:

Name of Decedent:	John A. Doe
Street of Decedent:	100 Main Street
City of Decedent:	Des Moines
State of Decedent:	Iowa
Gender of Decedent:	male
Spouse of Decedent:	Jane A. Doe 100 Main Street Des Moines, Iowa
Heir 1:	Sam J. Doe
Heir 2:	Our Child, Sam J. Doe Our Child 1.0, October 1, 2008 10-1-08

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Special Needs Trust

- For a "Special Needs Trust", use DPS 8 to produce a Will, Revocable Trust or Irrevocable Trust. Produce the document as either a Word or WordPerfect file and make necessary additions and/or changes in the word Processor.
- Make sure there are no graphics in the document to be produced. See [Documents With Graphics](#)

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Estate Planning Suggestions

• How to Make Estate Planning Documents from Estate Planning Diagram

- This suggestion will show you how to prepare estate planning documents, including a Diagram, quickly and efficiently.
- The Diagram is produced first.
 - All answers in the Diagram screens are automatically linked to the screens in the other estate planning documents, including Will, Revocable Trust, Powers, etc.
- Log in to DPS 8
 - Create a new Client
 - Select Estate Planning as the Area of Law
 - Select Diagrams For Clients as the Document
 - Select the appropriate Guide
 - Enter all required information on all of the screens
 - Produce the Diagram
 - When you produce the Diagram, DPS 8 will remind you if there are still areas that still need information
 - Produce the Diagram before changing box sizes
 - Change size of boxes. Sizes are in 1/100 of inch
 - You may produce the Diagram unlimited times using the Produce button until the box sizes are correct
- Once the Diagram is complete you can produce the estate planning documents
 - Select the document, such as Will, Powers Of Attorney, etc.
 - Press Next through a few screens
 - Make sure all boxes are checked on the screen which asks what you want to change
 - Select Produce to produce the Will
 - The Will can be produced as a PDF or as a word processing file
 - Select a word processing format if you need to make minor changes in the provisions of the Will

• How to Create a Spouse's Will Using Some of The Information Contained in a DPS 8 Client File

- This suggestion will show you how to create a spouse's Will, Jane P. Doe, which contains **some** of the information in the first spouse's Will, John E. Doe.
 - When creating John E. Doe's Will
 - Near the end of entering information in John E. Doe's Will, indicated that a Will will be created for his spouse.
 - The last page of John Doe's Will shows the ID number of the client file for John E. Doe. This will be entered when you prepare the Will for Jane P. Doe.
 - Create a new Client for Jane P. Doe.
 - Open the Jane P. Doe client, selecting Estate Planning as the Area of Law and Will as the document.
 - Select the appropriate Guide. Usually, this will be the same Guide as used in John E. Doe's Will.
 - Provisions of Jane P. Doe's Will is based on the Guide selected.
 - On the first screen, enter the client name for John E. Doe.
 - "Name Lookup Information" is inserted in the Jane P. Doe's Will, including all names and addresses entered in John E. Doe's Will.
 - By clicking on the icon to the right of the name line, change the name of the Client to Jane P. Doe by highlighting the name and clicking on Select.
 - The information for Jane P. Doe will be automatically entered on the screen.

- Make any necessary changes in the information for Jane P. Doe's Will.
- Click on the icon to the right of a name line, to easily select names and addresses of persons or entities.

• **How to Produce a Will Designating Ages and a Timed Release of Benefits**

- This suggestion will show you how to designate when distributions are to be made out of the Family Trust in a Will.
 - Any number of distributions can be made:
 - At certain ages or number of years.
 - In equal amounts, percentages or in dollar amounts of the trust shares.
- Login to DPS 8
 - Select a Client or create a new client
 - Select the Estate Planning area of law
 - Select the Will document
 - Base the document on the appropriate guide
- Enter the all of the information needed for the Will, including the Provisions Of Last Will And Testament
 - Suggested answers are in parentheses
 - When you get to the Bequest Of Residual
 - Select the Number Of Residual Entities (usually 1)
 - Select Residual Trust as the Residual Entity
 - Continue to answer the Screens as needed
 - Determine when the Residual Trust divides (i.e. when yougest child is 22)
 - Determine when shares of the Residual Trust distribute (i.e. after death of spouse)
 - Enter the number of distributions (i.e. 3)
 - Select the amount of the first distribution (i.e. equal share)
 - Enter the age when the first distribution is made (25i.e.)
 - Select the amount of the second distribution (i.e. equal share)
 - Enter the age when the second distribution is made (i.e. 30)
 - Enter the age when the final distribution is made (i.e. 35)

• **Normal Revocable Trusts**

- Should make a revocable trust for each spouse.

• **Joint Revocable Trust**

- Answer both for who is Settlor.

• **Disabled Child**

- Produce document without graphics
- Produce in Word or WordPerfect and make necessary changes

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Out Of State Property For A Probate

- In the Death Tax Returns document in Probate, list all real estate both in and out of the resident state. If you've entered the state in the address, DPS 8 will include or exclude the item appropriately on the resident state forms.
- Remember that you need to file probate documents in the state where the real estate is located as well.

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Tutorials

- You can view the following tutorials to assist you in using DPS 8 in your practice by going to <http://www.DPS8.com/tutorials.php>
 - How DPS 8 Works
 - Estate Planning Using DPS 8
 - How To Create A Spouse's Will Using Some Of The Information Contained In A DPS 8 Client File
 - How To Make Estate Planning Documents From Estate Planning Diagram
 - How To Produce A Will Designating Ages And A Timed Release Of Benefits
 - How To Use My Guides In DPS 8
- You can also direct your clients to view the following tutorials which will assist them in Estate Planning by going to to <http://www.dps8.com/tutorials.php>
 - Steps To Design A Will
 - What Are Living Wills, Health Care Powers And Financial Powers?
 - When Should I Review My Will?
 - Should I Use A Revocable Trust?

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DPS Documents and Guides

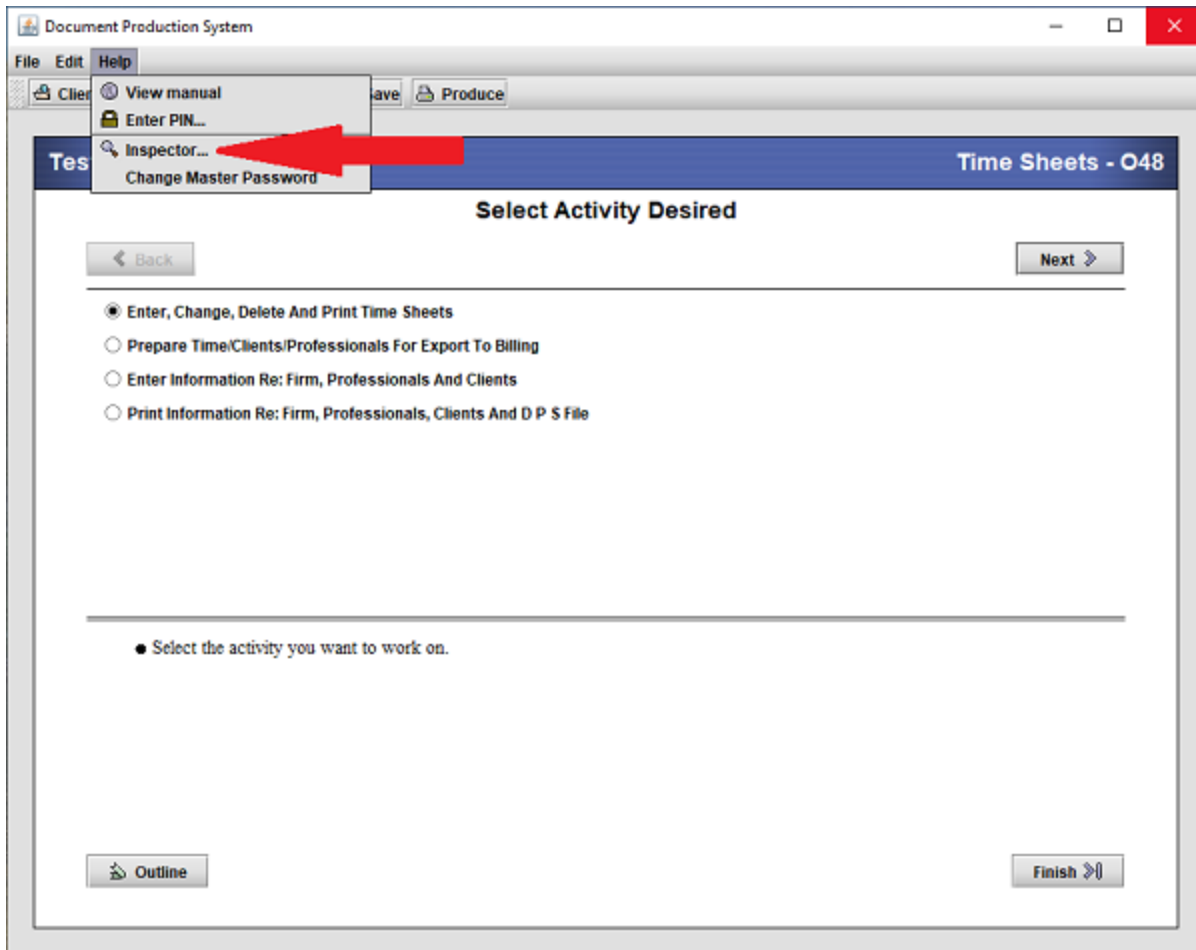
- Go to <http://www.dps8.com/documents.php> to get a complete listing of the documents and guides available in each state.

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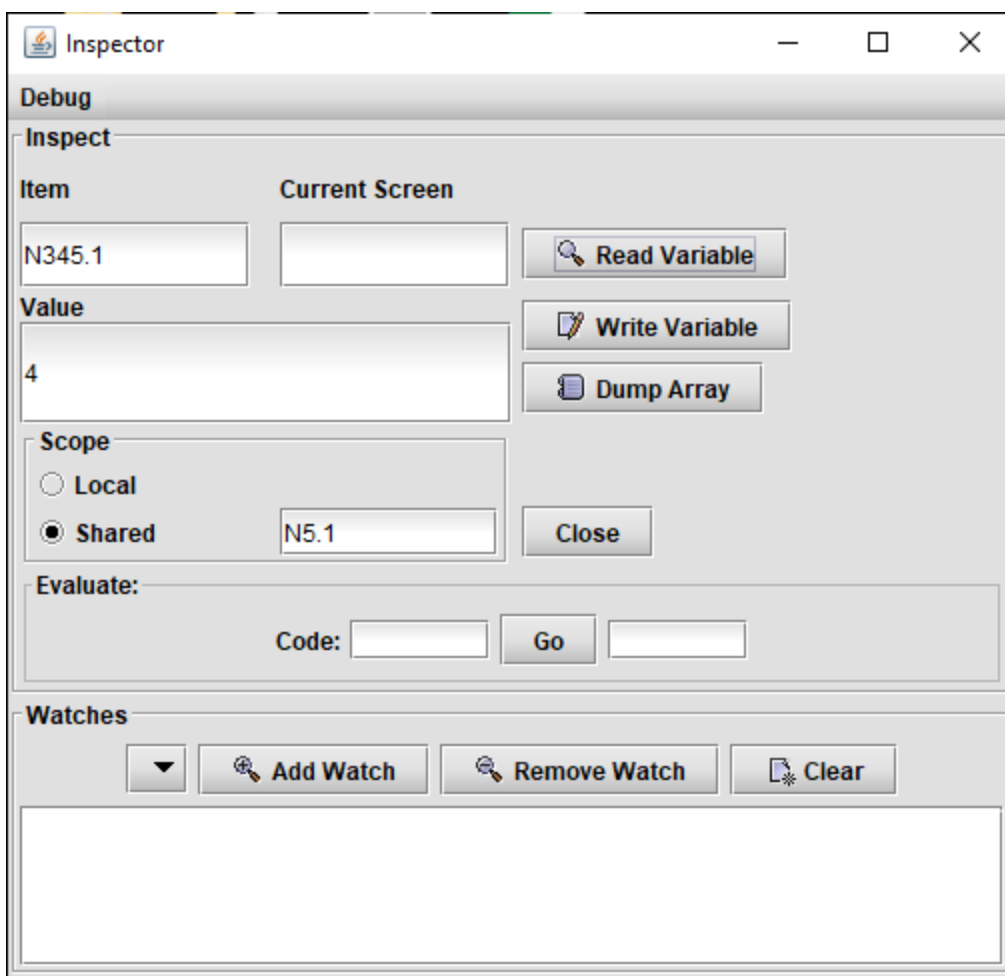
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Inspector

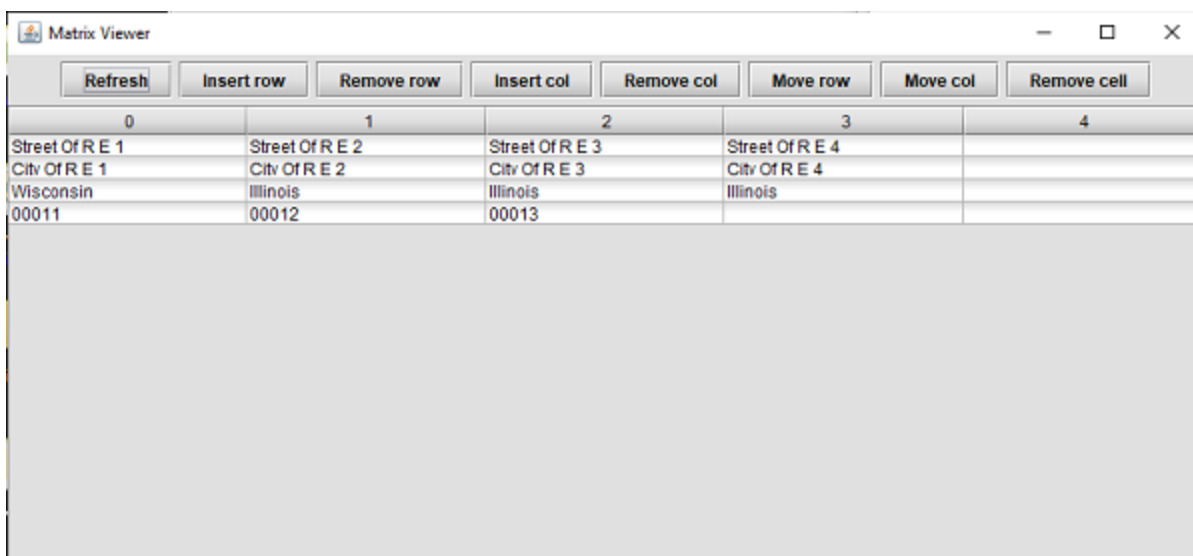
- Sometimes it is useful to see what information is on a screen, invisible or visible. Display Inspector by selecting Help then Inspector. DPS 8 customer support (515-282-7702) will work with you to use the Inspector.



- The Inspector:
 - Shows the value of a designated line on a designated screen by clicking on Read Variable
 - Allows the value of a designated line on a designated screen to be changed by clicking on Write Variable
 - Shows whether the value is Local or Shared
 - Allows setting a Watch to see when the value changes as DPS 8 is used



- The Matrix View is shown by clicking Dump Array and:
 - Shows values for all lines on a designated screen
 - Shows all values on all of the screens included in a loop
 - Rows and columns can be inserted, removed and moved
 - Cells can be removed

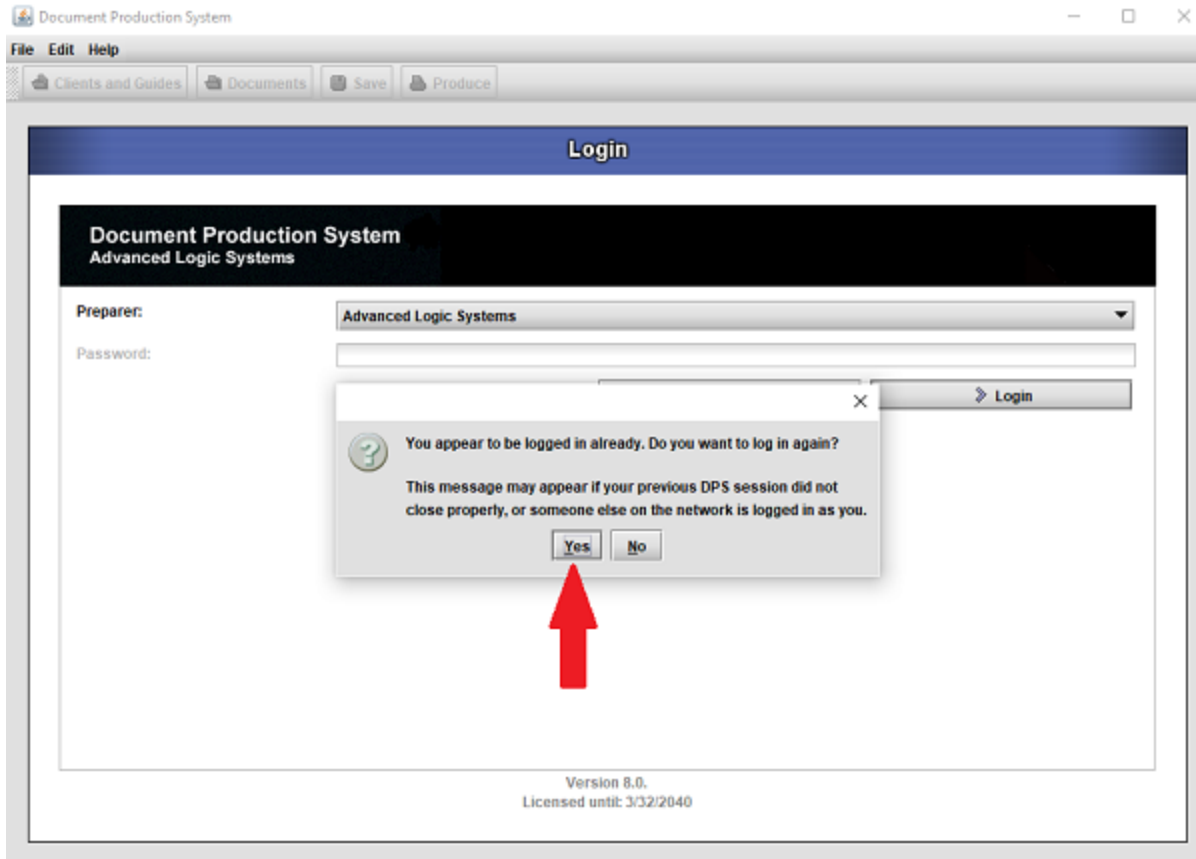


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Duplicate Logins

- If DPS 8 exited unexpectedly during a previous session, or someone else has logged in as you via a network, you will receive a message indicating this after clicking the Login button. You should not login if someone else has logged in as you via a network. You can still login if DPS 8 exited unexpectedly during a previous session. When you close and restart DPS 8 you will not get that message.

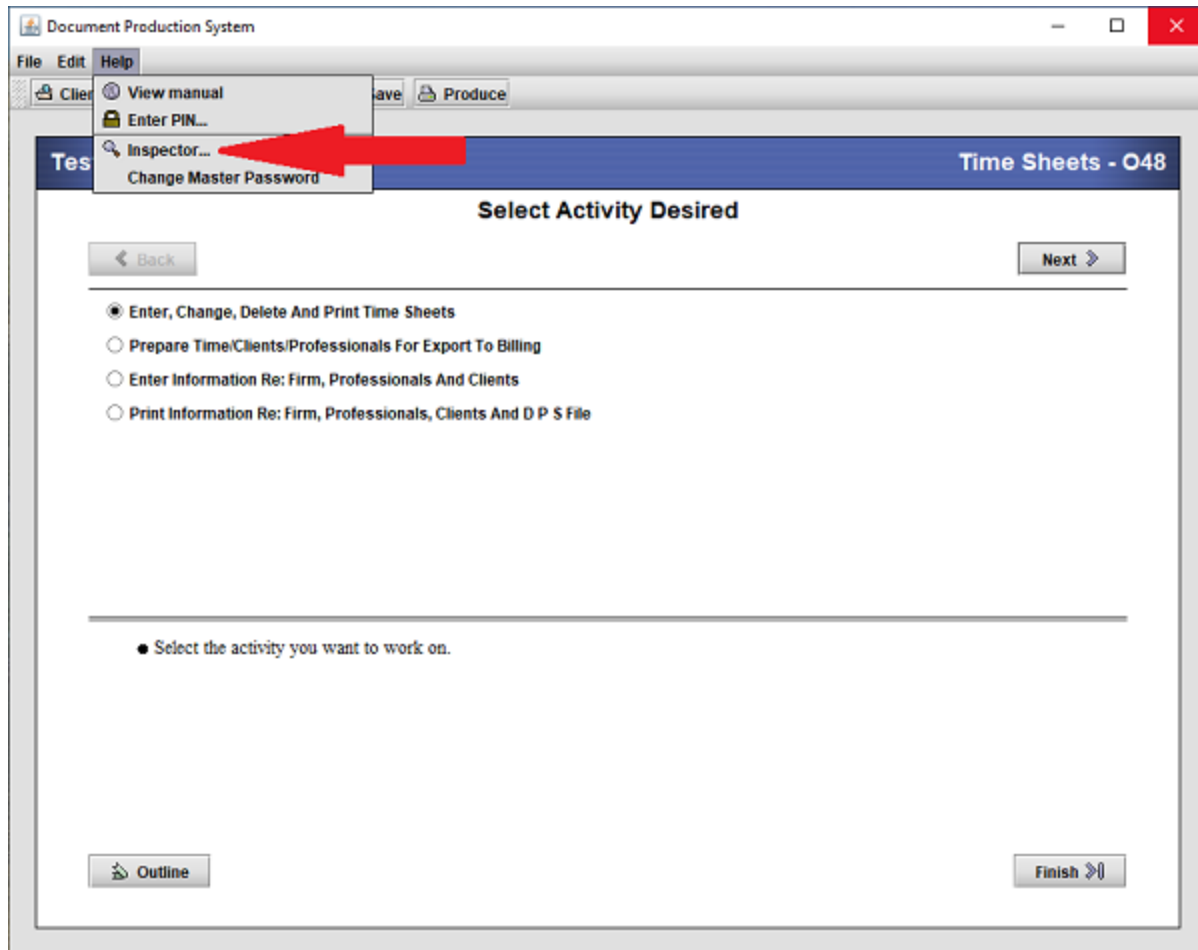


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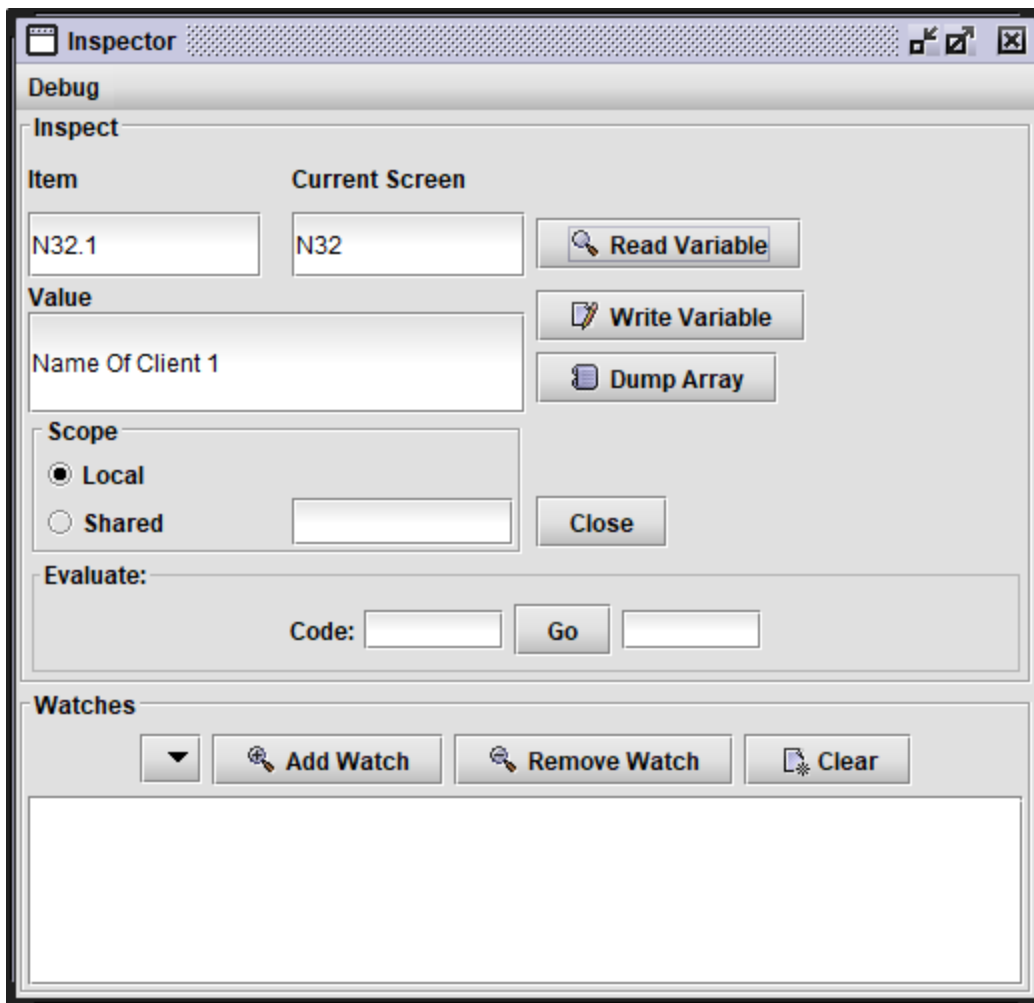
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Changing Number Of Items In Loop

- If DPS 8 has extra items on a schedule or list it can be corrected by taking the following steps:
 - Make sure you are logged in to DPS 8 and have the file open, then find the screen where you specify you would like to add/change/delete something on the schedule in question. (This is done to make sure you are not in the middle of a loop.)
 - Go to the menu bar at the top of DPS 8 and **Select Help then Inspector.**



- In the Inspector, you'll see a box labeled "Item". Type the Screen Number into the box. (i.e. N32.1) It doesn't matter if the letter is upper or lower case.



- Click on the Read Variable button.
- Check the Value that DPS 8 shows. This is the number of items that DPS 8 thinks are on the schedule. (Example: For a client who has three actual pieces of real estate and a ghost, the value will probably be 4.) If the value is not what you predict, something is wrong and you should change it to the desired value. (In the example: 3). Next, click on the Write Variable button.
- Immediately close the inspector using the button marked with an X in the upper right corner.
- You can now click on Finish in the lower right hand corner of DPS 8. Save and Produce the document to check your work.
- Refer to the appropriate Area Of Law below to see lists of the relevant values in documents in that Area Of Law.

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Accounting

- Refer to the appropriate document to see a list of relevant values.
 - **AC01 -- Time Sheets**
 - Time Sheets -- Number Of Time Entries -- N46.1.S1
 - Time Sheets -- Number Of Time Entries -- N33.1
 - Time Sheets -- Number Of Time Sheets -- N26.1
 - Time Sheets -- Number Of Time Sheets To Be Printed -- N18.1
 - Clients -- Number Of Clients -- N14.1
 - Professionals -- Number Of Professionals -- N8.1
 - **AC04 -- Billing**
 - Import -- Number Of Time Entries To Be Imported -- N53.1
 - Import -- Number Of Time Entries For This Clients -- N107.1
 - Import -- Number Of Imported Clients -- N30.3
 - Print -- Number Of Time Entries To Be Printed -- N111.3
 - Payments -- Number Of Payments -- N98.1
 - Advances -- Number Of Advances -- N105.1
 - Professionals -- Number Of Professionals -- N8.1
 - Clients -- Number Of Clients -- N14.1
 - **AC10 -- Accounting Backup**
 - Backup -- Number of Time Entries From AC01 -- N11.1
 - Backup -- Number of Clients From AC01 -- N11.2
 - Backup -- Number of Professionals From AC01 -- N11.3

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Charitable

- Refer to the appropriate document to see a list of relevant values.
- **CH01 -- Client Communications**
 - Table Of Contents -- Number Of Other Documents -- N37.1
 - Engagement Letter -- Number Of Attorney / Staffs -- N17.1
 - Engagement Letter -- Number Of Paragraphs -- N33.1
- **CH10 -- Articles Of Incorporation**
 - Number Of Incorporators -- N21.1
 - Number Of Initial Directors -- N171.1
 - Number Of Supported Organizations -- N62.1
 - Number Of Other Powers -- N79.1
 - Number Of Restrictions -- N87.1
 - Number Of Additional Articles -- N39.1
- **CH20 -- Bylaws**
 - Number Of Additional Articles -- N48.1
- **CH30 -- Minutes**
 - Number Of Incorporators -- N62.1
 - Number Of Directors -- N68.1
 - Number Of Members -- N92.1
 - Director Minutes -- Number Of Resolutions -- N22.1
 - Members Minutes -- Number Of Resolutions -- N41.1
 - Members And Directors Minutes -- Number Of Resolutions -- N95.1
 - Incorporators Minutes -- Number Of Resolutions -- N108.1
- **CH30 -- Application For Exempt Status**
 - Number Of Directors -- N474.1
 - Number Of Supported Organizations -- N28.1
 - Number Of Activities -- N80.1
 - Number Of Employees -- N384.1
 - Number Of Independent Contractors -- N391.1
 - Number Of Persons Related With -- N410.1
 - Number Of Officers / Directors Having Relationships -- N401.1
 - Disbursements
 - Number Of Other Expenses -- N191.1
 - Number Of Other Expenses -- N198.1
 - Number Of Other Expenses -- N205.1
 - Number Of Other Expenses -- N212.1
 - Balance Sheet
 - Number Of Bonds -- N58.1
 - Number Of Stocks -- N63.1

- Number Of Loans Receivable -- N72.1
 - Number Of Other Investments -- N85.1
 - Number Of Depreciable Assets -- N92.1
 - Number Of Other Assets -- N126.1
 - Number Of Mortgages / Notes Payable -- N133.1
 - Number Of Other Liabilities -- N140.1
 - Number Of Contributors With Total Gifts Over 2% -- N152.1
 - Number Of Disqualified Persons - N158.1
 - Number Of Contributors With Total Gifts Over 1% -- N165.1
 - Number Of Unusual Grants -- N172.1
 - Number Of Representatives -- N179.1
- **CH80 -- Miscellaneous Documents**
 - None

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Corporations

- Refer to the appropriate document to see a list of relevant values.
 - **AR03 -- Articles Of Incorporation**
 - Number Of Incorporators -- N29.1
 - Number Of Initial Directors -- N46.1
 - Number Of Other Officers -- N84.1
 - Number Of Additional Articles -- N49.1
 - **BY03 -- Bylaws**
 - Number Of Other Officers -- N71.1
 - Number Of Additional Articles -- N59.1
 - **CO01 -- Client Communications**
 - Table Of Contents -- Number Of Other Documents -- N37.1
 - Other Table Of Contents -- Number Of Documents -- N8.1
 - Engagement Letter -- Number Of Attorney / Staffs -- N29.1
 - Engagement Letter -- Number Of Paragraphs -- N45.1
 - **CO50 -- Securities**
 - Number Of Other Officers -- N41.1
 - Number Of Additional Legends -- N20.1
 - Number Of Stock Certificates -- N67.1
 - Number Of Number Of Shareholders -- N78.1.S1
 - Number Of Number Of Assignees -- N56.1.S1
 - **CO80 -- Miscellaneous Documents**
 - Number Of Incorporators -- N36.1
 - **CO85 -- Your Documents**
 - Number Of Incorporators -- N39.1
 - Number Of Directors -- N37.1
 - Number Of Other Officers -- N51.1
 - Number Of Paragraphs -- N17.1
 - **Mi03 -- Minutes**
 - Number Of Directors -- N11.1
 - Number Of Other Officers -- N84.1
 - Number Of Incorporators -- N115.1
 - Number Of Shareholders -- N617.1
 - Directors Minutes -- Number Of Shareholders Who Will Receive Stock -- N632.1
 - Number Of Assets To Be Transferred -- N630.1.S1
 - Directors Minutes -- Number Of Other Resolutions -- N135.1

- Shareholders Minutes -- Number Of Shareholders Who Will Receive Stock -- N202.1
- Number Of Assets To Be Transferred -- N201.1.S1
- Shareholders Minutes -- Number of Other Resolutions -- N163.1
- Shareholders And Directors Minutes -- Number of Shareholders Who Will Receive Stock -- N223.1
- Number of Assets to be Transferred -- N222.1
- Shareholders And Directors Minutes -- Number of Other Resolutions -- N173.1
- Incorporators Minutes -- Number of Shareholders Who Will Receive Stock -- N244.1
- Number of Assets to be Transferred -- N243.1.S1
- Incorporators Minutes -- Number of Other Resolutions -- N181.1

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Employment

- Refer to the appropriate document to see a list of relevant values.
 - **EM05 -- Employee Information**
 - Number Of All Dependents - N15.1
 - **EM20 -- Employment Contract**
 - Number Of Standard Provisions -- N19.1
 - Number Of Annual Salaries -- N66.1
 - Number Of Bonuses -- N300.1
 - Number Of Annual Bonuses -- N79.1
 - Number Of Other Compensations -- N139.1
 - Number Of Annual Vacations -- N102.1
 - Number Of Annual Paid Time Offs -- N109.1
 - Number Of Annual Credits To Deferred Compensation Account -- N165.1
 - Number Of Additional Credits To Deferred Compensation Account -- N180.1
 - Number Of Other Vesting Provisions -- N230.1
 - Number Of Other Payment Provisions -- N263.1
 - Number Of Prior Deferred Compensation Agreements -- N192.1
 - Number Of Other Provisions -- N183.1
 - Number Of Non-Standard Fringe Benefit Plans -- N132.1
 - Number Of Standard Restrictions -- N32.1
 - Number Of Other Non-Solicitation Provisions -- N310.1
 - Number Of Other Non-Compete Provisions -- N153.1
 - Number Of Non-Standard Restrictions -- N39.1
 - Number Of Other Provisions -- N46.1
 - **EM23 -- Incentive Compensation Agreement**
 - None
 - **EM25 -- Deferred Compensation Agreement**
 - Number Of Annual Credits To Deferred Compensation Account -- N165.1
 - Number Of Additional Credits To Deferred Compensation Account -- N180.1
 - Number Of Other Vesting Provisions -- N230.1
 - Number Of Other Payment Provisions -- N263.1
 - Number Of Prior Deferred Compensation Agreements -- N192.1
 - Number Of Other Provisions -- N183.1
 - **EM28 -- Non-Solicitation Agreement**
 - Number Of Standard Provisions -- N19.1
 - **EM30 -- Non-Compete Agreement**
 - Number Of Other Non-Compete Provisions -- N153.1

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Estate Planning

- Refer to the appropriate document to see a list of relevant values.
- **EP05 -- Client Communications**
 - Number Of All Children -- N114.1
 - Outline -- Number Of Topics -- N59.1
 - Table Of Contents -- Number Of Trusts -- N9.1
 - Table Of Contents -- Number Of Charitable Entities -- N19.1
 - Table Of Contents -- Number Of Death Tax Projections -- N37.1
 - Table Of Contents -- Number Of Documents -- N150.1
 - Cover Sheets -- Number Of Trusts -- N66.1
 - Instructions For Signing -- Number Of Documents -- N84.1
 - Cover Letter -- Number Of Paragraphs -- N91.1
 - Engagement Letter -- Number Of Attorney / Staffs -- N128.1
 - Engagement Letter -- Number Of Paragraphs -- N139.1
- **EP10 -- Diagrams For Client**
 - Number Of All Children -- N114.1
 - Will -- Number Of Original Beneficiaries Of Testator's Homestead -- N189.1
 - Will -- Number Of Successor Homestead Beneficiary Groups -- N210.1
 - Will -- Number Of First / Second Successor Beneficiaries Of Homestead -- N209.1.S1
 - Will -- Number Of Original Beneficiaries Of Testator's Personal Property -- N217.1
 - Will -- Number Of Successor Personal Property Beneficiary Groups -- N238.1
 - Will -- Number Of First / Second Successor Beneficiaries Of P P -- N237.1.S1
 - Will -- Number Of Specific Bequests -- N249.1
 - Will -- Number Of Original M T Trustees -- N260.1
 - Will -- Number Of Successor Trustees Groups - M T -- N283.1
 - Will -- Number Of First / Second Successor Trustees - M T -- N281.1.S1
 - Will -- Number Of Original F T Trustees -- N292.1
 - Will -- Number Of Successor Trustees Groups - F T -- N315.1
 - Will -- Number Of First / Second Successor Trustees - F T -- N313.1.S1
 - Will -- Number Of Beneficiaries Who Receive Family Trust -- N336.1
 - Will -- Number Of Beneficiaries Who Receive Residual -- N324.1
 - Will -- Number Of Original Executors -- N83.1
 - Will -- Number Of Successor Executors Groups -- N107.1
 - Will -- Number Of Successor Executors -- N105.1.S1
 - Will -- Number Of Original Guardians -- N158.1
 - Will -- Number Of Successor Guardians Groups -- N182.1
 - Will -- Number Of Successor Guardians -- N180.1.S1
 - Revocable Trust -- Number Of Original Beneficiaries Of Testator's Homestead -- N365.1
 - Revocable Trust -- Number Of Successor Homestead Beneficiary Groups -- N386.1
 - Revocable Trust -- Number Of First / Second Successor Beneficiaries Of Homestead -- N385.1.S1
 - Revocable Trust -- Number Of Original Beneficiaries Of Testator's Personal Property -- N393.1
 - Revocable Trust -- Number Of Successor Personal Property Beneficiary Groups -- N414.1
 - Revocable Trust -- Number Of First / Second Successor Beneficiaries Of P P -- N413.1.S1
 - Revocable Trust -- Number Of Specific Bequests -- N425.1
 - Revocable Trust -- Number Of Original M T Trustees -- N435.1
 - Revocable Trust -- Number Of Successor Trustees Groups - M T -- N458.1

- Revocable Trust -- Number Of First / Second Successor Trustees - M T -- N456.1.S1
 - Revocable Trust -- Number Of Original F T Trustees -- N466.1
 - Revocable Trust -- Number Of Successor Trustees Groups - F T -- N489.1
 - Revocable Trust -- Number Of First / Second Successor Trustees - F T -- N487.1.S1
 - Revocable Trust -- Number Of Beneficiaries Who Receive Family Trust -- N498.1
 - Revocable Trust -- Number Of Beneficiaries Who Receive Residual -- N529.1
 - Revocable Trust -- Number Of Original Trustees -- N539.1
 - Revocable Trust -- Number Of Successor Trustee Groups -- N563.1
 - Revocable Trust -- Number Of Successor Trustees -- N561.1.S1
 - Irrevocable Trust -- Number Of Specific Bequests -- N643.1
 - Irrevocable Trust -- Number Of Original M T Trustees -- N653.1
 - Irrevocable Trust -- Number Of Successor Trustees Groups - M T -- N676.1
 - Irrevocable Trust -- Number Of First / Second Successor Trustees - M T -- N674.1.S1
 - Irrevocable Trust -- Number Of Original F T Trustees -- N684.1
 - Irrevocable Trust -- Number Of Successor Trustees Groups - F T -- N707.1
 - Irrevocable Trust -- Number Of First / Second Successor Trustees - F T -- N705.1.S1
 - Irrevocable Trust -- Number Of Beneficiaries Who Receive Family Trust -- N716.1
 - Irrevocable Trust -- Number Of Beneficiaries Who Receive Residual -- N747.1
 - Irrevocable Trust -- Number Of Original Trustees -- N757.1
 - Irrevocable Trust -- Number Of Successor Trustees Groups -- N781.1
 - Irrevocable Trust -- Number Of Successor Trustees -- N779.1.S1
 - Financial Power -- Number Of Original Financial Agents -- N13.1
 - Financial Power -- Number Of Successor Financial Agents Groups -- N51.1.S1
 - Financial Power -- Number Of Successor Financial Agents -- N49.1
 - Health Care Power -- Number Of Original Health Care Agents -- N58.1
 - Health Care Power -- Number Of Successor Health Care Agents Groups -- N151.1.S1
 - Health Care Power -- Number Of Successor Health Care Agents -- N149.1
 - Number Of Diagram Paragraphs -- N510.1
- **EP25 -- Gift Tax Return**
 - Number Of Donees -- N6.1
 - Number Of Gifts -- N52.1.S1
 - Number Of Other Donees -- N231.1
 - Number Of Prior Tax Returns -- N41.1
- **LI03 -- Irrevocable Trust**
 - Number of All Children -- N287.1
 - Number Of Beneficiaries Who May Receive Distributions -- N262.1
 - Number of Specific Bequests -- N311.1
 - Number of Original MT 1 Trustees -- N178.1
 - Number of Successor Trustees Groups - MT 1 -- N808.1
 - Number of Number of Successor Trustees - MT 1 -- N806.1.S1
 - Number of Original MT 2 Trustees -- N827.1
 - Number of Successor Trustees Groups - MT 2 -- N850.1
 - Number of Number of Successor Trustees - MT 2 -- N848.1.S1
 - Number of Original MT 3 Trustees -- N78.1
 - Number of Successor Trustees Groups - MT 3 -- N820.1
 - Number of Number of Successor Trustees - MT 3 -- N811.1.S1
 - Number Of Beneficiaries Who Receive Residual Bequest 1 -- N909.1
 - Number of Original RT 1 Trustees -- N79.1
 - Number of Successor Trustees Groups - RT 1 -- N2012.1
 - Number of Number of Successor Trustees - MT 1 -- N210.1.S1
 - Number Of Beneficiaries Who Receive RT 1 -- N118.1

- Number Of Beneficiaries Who Receive Residual Bequest 2 -- N48.1
- Number of Original RT 2 Trustees -- N323.1
- Number of Successor Trustees Groups - RT 2 -- N868.1
- Number of Number of Successor Trustees - RT 2 -- N866.1.S1
- Number Of Beneficiaries Who Receive RT 2 -- N153.1
- Number Of Beneficiaries Who Receive Residual Bequest 3 -- N73.1
- Number of Original RT 3 Trustees -- N875.1
- Number of Successor Trustees Groups - RT 3 -- N898.1
- Number of Number of Successor Trustees - RT 3 -- N896.1.S1
- Number Of Beneficiaries Who Receive RT 3 -- N234.1
- Number of Additional Powers -- N40.1
- Number of Original Trustees -- N282.1
- Number of Successor Trustees Groups -- N169.1
- Number of Successor Trustees -- N147.1.S1
- Number Of All Persons To Disinherit -- N297.1
- Number of Additional Articles -- N300.1
- Number Of Asset Owned By Trusts -- N506.1

- **LT03 -- Miscellaneous Documents**
 - Number Of Beneficiaries -- N5.1
 - Number of Successor Trustees -- N52.1
 - Number of Beneficiaries of Trust -- N43.1

- **PR03 -- Estate Tax Projections**
 - Number Of Real Estate Owned -- N249.1
 - Number Of Stocks And Bonds Owned -- N257.1
 - Number Of Mortgages, Notes And Cash Owned -- N266.1
 - Number Of Insurance On Testator's Life Owned -- N275.1
 - Number Of Insurance On Spouse's Life Owned -- N284.1
 - Number Of Survivorship Insurance Owned -- N388.1
 - Number Of Jointly Owned With Spouse -- N293.1
 - Number Of Jointly Owned With Other -- N302.1
 - Number Of Other Miscellaneous Property Owned -- N311.1
 - Number Of Transfer During Life Owned -- N320.1
 - Number Of Powers Of Appointment Owned -- N329.1
 - Number Of Annuities Owned -- N338.1
 - Number Of Assets Not Subject To Death Taxes -- N99.1
 - Number Of Debts Owed -- N349.1
 - Number Of Mortgages And Liens Owed -- N358.1
 - Number Of Net Losses During Administration -- N367.1
 - Number Of Expenses Of Administration -- N376.1
 - Number Of Charitable Bequests -- N397.1
 - Number Of Projections -- N85.1

- **RE03 -- Revocable Trust**
 - Number of All Children -- N287.1
 - Number Of Original Beneficiaries Of Settlor's Homestead -- N264.1
 - Number of Successor Homestead Beneficiary Groups -- N463.1
 - Number Of First / Second Successor Beneficiaries Of Homestead -- N447.1.S1
 - Number Of Original Beneficiaries Of Settlor's Personal Property -- N348.1
 - Number Of Successor Personal Property Beneficiary Groups -- N525.1
 - Number Of First / Second Successor Beneficiaries Of P P -- N524.1.S1

- Number of Specific Bequests -- N311.1
- Number of Original MT 1 Trustees -- N178.1
- Number Of Successor Trustees Groups - M T 1 -- N808.1
- Number Of Successor Trustees - M T 1 -- N806.1.S1
- Number of Original MT 2 Trustees -- N827.1
- Number Of Successor Trustees Groups - M T 2 -- N850.1
- Number Of Successor Trustees - M T 2 -- N848.1.S1
- Number of Original MT 3 Trustees -- N78.1
- Number Of Successor Trustees Groups - M T 3 -- N820.1
- Number Of Successor Trustees - M T 3 -- N811.1.S1
- Number Of Beneficiaries Who Receive Residual Bequest 1 -- N909.1
- Number of Original R T 1 Trustees -- N79.1
- Number Of Successor Trustees Groups - R T 1 -- N212.1
- Number Of Successor Trustees - R T 1 -- N210.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 1 -- N118.1
- Number Of Beneficiaries Who Receive Residual Bequest 2 -- N48.1
- Number of Original R T 2 Trustees -- N323.1
- Number Of Successor Trustees Groups - R T 2 -- N868.1
- Number Of Successor Trustees - R T 2 -- N866.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 2 -- N153.1
- Number Of Beneficiaries Who Receive Residual Bequest 3 -- N73.1
- Number of Original R T 3 Trustees -- N875.1
- Number Of Successor Trustees Groups - R T 3 -- N898.1
- Number Of Successor Trustees - R T 3 -- N896.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 3 -- N234.1
- Number of Additional Powers -- N40.1
- Number Of Original Trustees -- N282.1
- Number of Successor Trustees Groups -- N169.1
- Number Of Successor Trustees -- N147.1.S1
- Number Of All Persons To Disinherit -- N297.1
- Number of Additional Articles -- N300.1
- Number Of Assets Owned By Trust -- N506.1
- Amendment -- Number Of All Children -- N411.1
- Amendment -- Number Of Original Trustees -- N390.1
- Amendment -- Number Of Amendments -- N374.1

- **SP03 -- Split Dollar Agreements**

- Number Of Owners -- N49.1
- Number Of Additional Paragraphs In Split Dollar Agreement -- N29.1
- Number Of Additional Paragraphs In Collateral Assignment -- N38.1

- **WI03 -- Will**

- Number of All Children -- N341.1
- Number Of Original Beneficiaries Of Testator's Homestead -- N40.1
- Number of Successor Homestead Beneficiary Groups -- N190.1
- Number Of First / Second Successor Beneficiaries Of Homestead -- N189.1.S1
- Number Of Original Beneficiaries Of Testator's Personal Property -- N329.1
- Number Of Successor Personal Property Beneficiary Groups -- N382.1
- Number Of First / Second Successor Beneficiaries Of P P -- N381.1.S1
- Number of Specific Bequests -- N393.1
- Number of Original MT 1 Trustees -- N156.1
- Number Of Successor Trustees Groups - M T 1 -- N206.1
- Number Of Successor Trustees - M T 1 -- N204.1.S1

- Number of Original MT 2 Trustees -- N902.1
- Number Of Successor Trustees Groups - M T 2 -- N925.1
- Number Of Successor Trustees - M T 2 -- N923.1.S1
- Number of Original MT 3 Trustees -- N368.1
- Number Of Successor Trustees Groups - M T 3 -- N892.1
- Number Of Successor Trustees - M T 3 -- N890.1.S1
- Number Of Beneficiaries Who Receive Residual Bequest 1 -- N22.1
- Number of Original R T 1 Trustees -- N46.1
- Number Of Successor Trustees Groups - R T 1 -- N87.1
- Number Of Successor Trustees - R T 1 -- N80.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 1 -- N106.1
- Number Of Beneficiaries Who Receive Residual Bequest 2 -- N230.1
- Number of Original R T 2 Trustees -- N282.1
- Number Of Successor Trustees Groups - R T 2 -- N305.1
- Number Of Successor Trustees - R T 2 -- N303.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 2 -- N314.1
- Number Of Beneficiaries Who Receive Residual Bequest 3 -- N463.1
- Number of Original R T 3 Trustees -- N475.1
- Number Of Successor Trustees Groups - R T 3 -- N498.1
- Number Of Successor Trustees - R T 3 -- N496.1.S1
- Number Of Beneficiaries Who Receive Residual Trust 3 -- N507.1
- Number of Additional Powers -- N406.1
- Number Of Original Executor-- N102.1
- Number of Successor Executors Groups -- N245.1
- Number Of Successor Executors -- N243.1.S1
- Number Of Original Guardians-- N171.1
- Number of Successor Guardians Groups -- N561.1
- Number Of Successor Guardians -- N559.1.S1
- Number Of Original Conservators -- N572.1
- Number of Successor Conservators Groups -- N596.1
- Number Of Successor Conservators -- N594.1.S1
- Number Of Original Custodians -- N603.1
- Number of Successor Custodians Groups -- N627.1
- Number Of Successor Custodians -- N625.1.S1
- Number Of All Persons To Disinherit -- N861.1
- Number of Additional Articles -- N397.1
- Codicil -- Number Of All Children -- N
- Codicil -- Number Of Original Executors -- N
- Codicil -- Number Of Codicils -- N376.1

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Income Taxes

- Refer to the appropriate document to see a list of relevant values.
 - **IT03 -- Copy DPS Client Information**
 - None
 - **IT10 -- Estimated Tax Vouchers**
 - None
 - **IT20 -- Income Tax Projections**
 - Number Of Salaries -- N172.1
 - Number Of Interest Received -- N179.1
 - Number Of Dividends -- N184.1
 - Number Of Alimonies Received -- N190.1
 - Number Of Business Incomes -- N200.1
 - Number Of Capital Gains (Losses) -- N202.1
 - Number Of Other Gains Received -- N209.1
 - Number Of I R A Distributions Received -- N215.1
 - Number Of Pension Distributions Received -- N218.1
 - Number Of Rents And Royalties Received -- N237.1
 - Number Of Partnership Incomes Received -- N248.1
 - Number Of Sub-S Incomes Received -- N306.1
 - Number Of Trust And Estate Incomes Received -- N259.1
 - Number Of Farm Incomes -- N270.1
 - Number Of Unemployment Compensations -- N281.1
 - Number Of Social Securities Received -- N292.1
 - Number Of Other Incomes -- N303.1
 - Number Of I R A Contributions -- N325.1
 - Number Of Moving Expenses -- N369.1
 - Number Of Health Insurance / Plan Payments -- N380.1
 - Number Of S E P / Qualified Plan Payments -- N391.1
 - Number Of Early Withdrawal Penalties -- N402.1
 - Number Of Alimony Paid -- N413.1
 - Number Of Other Adjustments -- N56.1
 - Number Of Medical / Dental Expenses -- N424.1
 - Number Of Real Estate Taxes -- N435.1
 - Number Of New Motor Vehicle Taxes Paid -- N446.1
 - Number Of Other Taxes Paid -- N457.1
 - Number Of Mortgage Interest Paid -- N468.1
 - Number Of Investment Interest Paid -- N490.1
 - Number Of Gifts To Charity -- N501.1
 - Number Of Casualty / Theft Losses -- N512.1
 - Number Of Employee Expenses -- N523.1
 - Number Of Other 2 % Expenses -- N534.1
 - Number Of Other Miscellaneous Deductions -- N545.1
 - Number Of Fiduciary Fees -- N480.1
 - Number Of Professional Fees -- N557.1

- Number Of Non 2 % Expenses -- N568.1
 - Number Of Taxes On Tip Income -- N89.1
 - Number Of Tax On Qualified Plans -- N100.1
 - Number Of Household Employment Taxes -- N111.1
 - Number Of Other Taxes -- N122.1
 - Number Of Foreign Tax Credits -- N67.1
 - Number Of Other Tax Credits -- N78.1
 - Number Of Assumptions -- N329.1
- **IT31 -- Depreciation Schedule**
 - Number Of Assets -- N13.1
- **IT75 -- SS4 - 2553 - 56 Tax Forms**
 - Number Of Shares -- N29.1
 - Number Of Stocks -- N30.1
 - Number Of Shareholders -- N124.1
- **IT77 -- Employment Tax Forms**
 - None

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Ltd. Liability Company

- Refer to the appropriate document to see a list of relevant values.

- **LL01 -- Client Communications**
 - Table Of Contents -- Number Of Other Documents -- N37.1
 - Engagement Letter -- Number Of Attorney / Staffs -- N17.1
 - Engagement Letter -- Number Of Paragraphs -- N33.1

- **LL02 -- Certificate Of Organization**
 - Number of Organizers -- N84.1
 - Number of Members -- N73.1
 - Number of Managers -- N34.1
 - Number Of Member-Managers -- N50.1
 - Number of Other Officers -- N93.1
 - Number of Additional Articles -- N55.1

- **LL03 -- Articles Of Organization**
 - Number Of Organizers -- N84.1
 - Number Of Managers -- N34.1
 - Number Of Member-Managers -- N50.1
 - Number Of Other Officers -- N93.1
 - Number Of Additional Articles -- N55.1

- **LL50 -- Securities**
 - Number Of Organizers -- N32.1
 - Number of Members -- N44.1
 - Number Of Managers -- N52.1
 - Number Of Member-Managers -- N61.1
 - Number Of Other Officers -- N108.1
 - Number Of Additional Legends -- N80.1
 - Number of Membership Certificates -- N99.1
 - Number Of Members -- N84.1.S1
 - Number Of Units Assigned -- N95.1.S1
 - Number of Assignees -- N98.1.S1

- **LL80 -- Miscellaneous Documents**
 - Number Of Members -- N20.1

- **LM03 -- Minutes**
 - Number Of Organizers -- N393.1
 - Number Of Members -- N402.1
 - Number Of Managers -- N410.1
 - Number Of Member-Managers -- N418.1
 - Number Of Other Officers -- N90.1

- Members Minutes -- Number Of Members Who Will Receive Units -- N433.1
- Members Minutes -- Number Of Assets To Be Transferred -- N432.1.S1
- Members Minutes -- Number Of Other Resolutions -- N62.1
- Organizers Minutes -- Number Of Members Who Will Receive Units -- N82.1
- Organizers Minutes -- Number Of Assets To Be Transferred -- N81.1.S1
- Organizers Minutes -- Number Of Other Resolutions -- N43.1

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Probate

- Refer to the appropriate document to see a list of relevant values.
 - **PB03 -- Copy From Estate Planning**
 - None
 - **PB04 -- Client Communications**
 - Table Of Contents -- Number Of Trusts -- N9.1
 - Table Of Contents -- Number Of Other Court Documents -- N17.1
 - Table Of Contents -- Number Of Other Tax Documents -- N25.1
 - Table Of Contents -- Number Of Other Estate Documents -- N37.1
 - Outline Of Probate Matters -- Number Of Topics -- N59.1
 - Engagement Letter -- Number Of Attorney / Staffs -- N66.1
 - Engagement Letter -- Number Of Paragraphs -- N49.1
 - **PB05 -- Probate Schedule**
 - Number of Codicils -- N85.1
 - Number of Executors -- N66.1
 - Number of Attorneys -- N78.1
 - **PB10 -- Open Estate**
 - Number of Codicils -- N326.1
 - Number of Heirs -- N82.1
 - Number of Executors -- N330.1
 - Number of Attorneys -- N74.1
 - Number of Petitioners -- N66.1
 - Number of Executors Declining To Serve -- N58.1
 - Number of Sureties -- N56.1
 - **PB25 -- Creditor Documents**
 - Number Of Executors -- N21.1
 - Number Of Claims -- N30.1
 - **PB30 -- Miscellaneous Documents**
 - Number Of Executors -- N47.1
 - Number Of Attorneys -- N28.1
 - Number Of Items Disclaimed -- N64.1
 - Universal Probate Document -- Number Of Paragraphs -- N8.1
 - Universal Probate Document -- Number Of Orders -- N57.1
 - Universal Probate Document -- Number Of Signors -- N71.1
 - Confirmation Letter -- Number Of Paragraphs -- N104.1
 - Confirmation Letter -- Number Of Account -- N88.1
 - Letter -- Number Of Paragraphs -- N117.1.S1
 - Letter -- Number Of Letters -- N128.1

- **PB40 -- Sale Of Property**

- Number Of Heirs -- N91.1
- Number Of Executors -- N100.1
- Number Of Purchasers -- N33.1.S1
- Number Of Properties -- N17.1

- **PB55 -- Death Tax Returns**

- Number Of Prior Spouses -- N649.1
- Number Of Codicils - N598.1
- Number Of Heirs Without Spouse -- N77.1
- Number Of Heirs With Spouse -- N77.2
- Number Of Executors -- N557.1
- Number Of Gift Tax Returns -- N513.1
- Number Of Attorneys -- N556.1
- Schedule A -- Number Of Real Estate -- N345.1
- Schedule B -- Number Of Stocks -- N143.1
- Schedule B -- Number Of Bonds -- N145.1
- Schedule C -- Number Of Mortgages, Notes And Cash -- N176.1
- Schedule D -- Number Of Insurance Policies -- N161.1
- Number Of Beneficiaries -- N188.1.S1
- Number Of Owners -- N197.1.S1
- Schedule E1 -- Number Of Jointly Held With Spouse -- N209.1
- Number Of Beneficiaries -- N255.1.S1
- Schedule E2 -- Number Of Jointly Held With Heirs -- N60.1
- Number Of Joint Owners -- N100.1.S1
- Number Of Beneficiaries -- N117.1.S1
- Number Of Joint Owners -- N236.1.S1
- Schedule F -- Number Of Miscellaneous Property -- N219.1
- Number Of Beneficiaries -- N229.1.S1
- Schedule G -- Number Of Transfers During Life -- N277.1
- Number Of Beneficiaries -- N284.1.S1
- Schedule H -- Number Of Powers Of Appointment -- N300.1
- Schedule I -- Number Of Annuities -- N322.1
- Number Of Recipients -- N332.1.S1
- Schedule J -- Number Of Funeral Expenses -- N494.1
- Schedule J -- Number Of Administrative Expenses -- N491.1
- Schedule K -- Number Of Debts -- N375.1
- Schedule K -- Number Of Mortgages/Liens -- N407.1
- Schedule L1 -- Number Of Losses During Administration -- N467.1
- Schedule L2 -- Number Of Expenses Of Administration -- N470.1
- Schedule O -- Number Of Charitable Bequests -- N504.1
- Number Of Income Beneficiaries -- N436.1.S1
- Number Of Spouses Received D S U E From -- N639.1
- Schedule M -- Number Of Assets Passing To Spouse -- N522.1
- Number Of Assets Passing To Heirs -- N540.1
- Number Of Heirs And Spouse Receiving Equal Share Of Income -- N106.1
- Number Of Heirs And Spouse Receiving Equal Share Of Remainder-- N123.1
- Number Of Executors Signing Federal 706 -- N14.1
- Number Of Executors Signing Probate Inventory -- N15.1
- Number Of Attorneys Signing Probate Inventory -- N16.1
- Number Of Signors Of Inventory -- N66.1
- Number Of After Born Children -- N36.1
- Number Of Attorneys Granted Iowa Power Of Attorney -- N37.1

- Number Of Executors Signing State Death Tax Return -- N38.1
- Number Of Attorneys Signing State Death Tax Return -- N40.1
- Number Of Signors Of State Death Tax Return -- N105.1

- **PB80 -- Attorney / Fiduciary Fees**
 - Number Of Executors -- N20.1
 - Number Of Attorneys -- N105.1
 - Number Of Applicants -- N113.1

- **PB90 -- Close Estate**
 - Number Of Executors -- N297.1
 - Number Of Heirs -- N555.1
 - Number Of Trustees -- N27.1.S1
 - Number Of Trusts -- N29.1
 - Number Of Jointly Owned With Spouse -- N39.1
 - Number Of Joint Owners -- N61.1.S1
 - Number Of Jointly Owned With Heirs -- N48.1
 - Number Of Heirs Receiving Real Estate -- N70.1.S1
 - Number Of Real Estate Items -- N74.1
 - Number Of Unpaid Debt / Claims -- N81.1
 - Number Of Attorneys -- N127.1

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Real Estate

- Refer to the appropriate document to see a list of relevant values.
 - **RE11 -- HUD/Settlement Statements**
 - Sellers -- Number Of Sellers -- N104.1
 - Buyers -- Number Of Buyers -- N119.1
 - **RE12 -- Deeds**
 - Sellers -- Number Of Sellers -- N91.1
 - Buyers -- Number Of Buyers -- N44.1
 - **RE15 -- Purchase Agreements**
 - Sellers -- Number Of Sellers -- N91.1
 - Buyers -- Number Of Buyers -- N44.1
 - Provisions -- Number Of Other Provisions -- N56.1
 - Amendments -- Number of Amendments -- N46.1

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