

TOTAL Planning Suite

Client Data and Scenarios

TOTAL Planning Suite 5.0 - file:///c:/documents and settings/terrie/my documents/money tree software/total planning system/data.vdb4

File Tools Report Selection Help

Settings Style ?

New Client Open Client Client Tasks

Client List

Clients

New Client Open Client Refresh Clients Client Tasks

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
▶ Abbett	Allen	555-123-4567		234-5678	12/22/2011	

Scenarios

Open Scenario Scenario Tasks

- Retire at 65
- Real Estate

Creating a New Client

Click on **[New Client]**
Or Select **[File]** then **[New Client]**

The screenshot displays the TOTAL Planning Suite 5.0 interface. The main window shows a 'Client List' table with one client, Abbett Allen. A callout box points to the 'New Client' button in the toolbar. Another callout box points to the 'New Client' option in the 'File' menu.

Client List

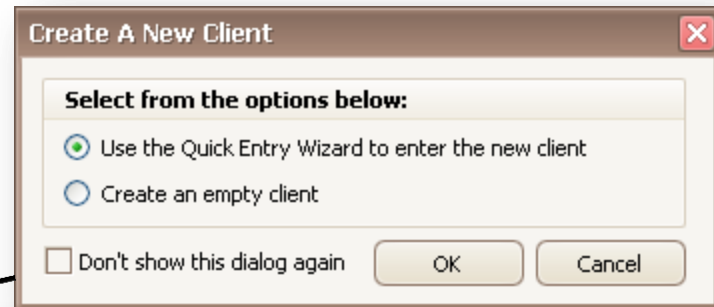
Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	12/22/2011	

File Tools Report Selection Help

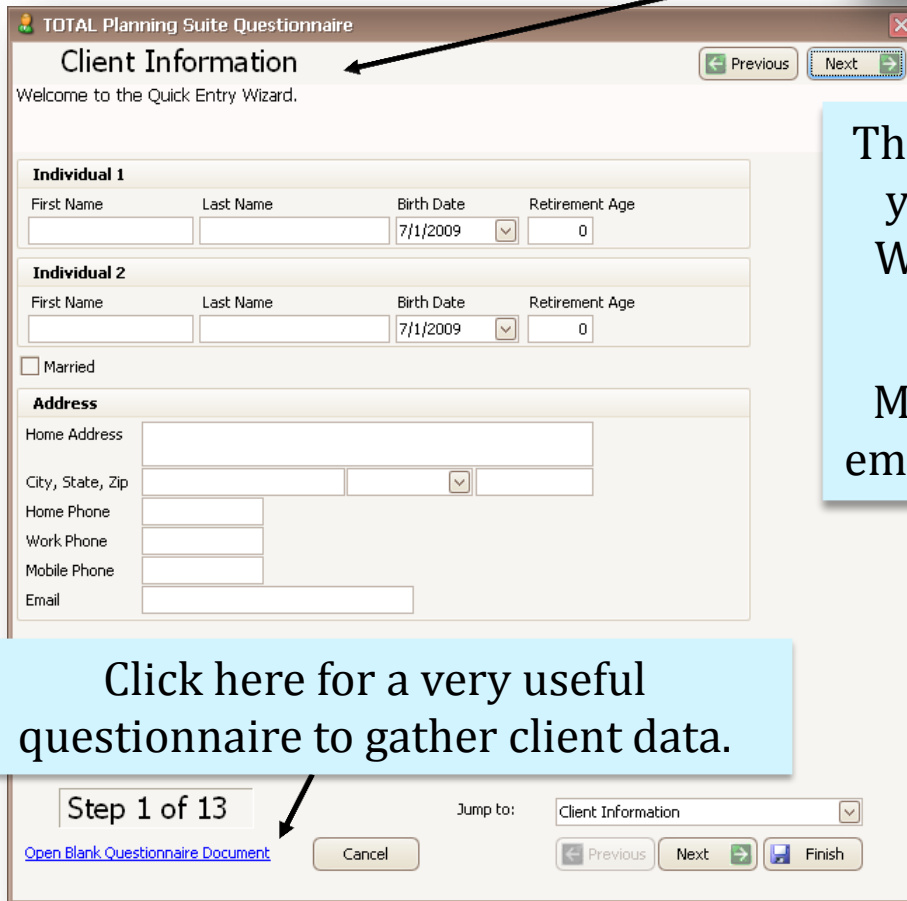
- Show Client List
- New Client**
- Open Client
- Copy Client
- Delete Client
- Import Client
- Export Client
- Import/Export Wizard
- Import TPS 3.x Database
- Create Scenario
- Open Scenario
- Copy Scenario
- Delete Scenario
- Open/Change Database
- Exit TOTAL Planning Suite

Quick Entry Wizard

Next, you will need to decide whether to use the **Quick Entry Wizard**, or to create a blank client.



A dialog box titled "Create A New Client" with a close button (X) in the top right corner. It contains a section "Select from the options below:" with two radio button options: "Use the Quick Entry Wizard to enter the new client" (which is selected) and "Create an empty client". At the bottom, there is a checkbox labeled "Don't show this dialog again" and two buttons: "OK" and "Cancel".



The main window is titled "TOTAL Planning Suite Questionnaire" and has a close button (X) in the top right. The subtitle is "Client Information". Below the title bar, there are "Previous" and "Next" buttons. The text "Welcome to the Quick Entry Wizard." is displayed. The form is divided into sections: "Individual 1" and "Individual 2", each with fields for "First Name", "Last Name", "Birth Date" (with a dropdown menu showing "7/1/2009"), and "Retirement Age" (with a dropdown menu showing "0"). Below these is a checkbox for "Married". The "Address" section includes fields for "Home Address", "City, State, Zip" (with a dropdown menu), "Home Phone", "Work Phone", "Mobile Phone", and "Email". At the bottom, there is a "Step 1 of 13" indicator, a "Jump to:" dropdown menu showing "Client Information", and buttons for "Cancel", "Previous", "Next", and "Finish". A link "Open Blank Questionnaire Document" is also present.

The **Quick Entry Wizard** is great to get you started entering client data. The Wizard leads you through 13 steps to enter client data.

More experienced users often use the empty client option and skip the wizard.

Click here for a very useful questionnaire to gather client data.

Create an Empty Client

If you chose to create an empty client, you will be taken directly to the Client Information tab.

The screenshot displays the TOTAL Planning Suite 5.0 software interface. The main window shows the 'Client Information' tab with fields for Individual 1 and Individual 2, including First, M.I., Last, Birth Date, SSN, Gender, and Date Married. The 'Address & Phone' section includes Home Address, City, State, Zip, and phone numbers for both individuals. The 'Account Type' section has a list of checkboxes: Active, Business, Client, Other, Personal, and Under Management. A 'Create A New Client' dialog box is open, showing two options: 'Use the Quick Entry Wizard to enter the new client' and 'Create an empty client', with the latter selected. A 'Client Created' confirmation message is also visible, stating 'Client created successfully.' and an 'OK' button.

CREATE A NEW CLIENT

Select from the options below:

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

☐ Don't show this dialog again

OK Cancel

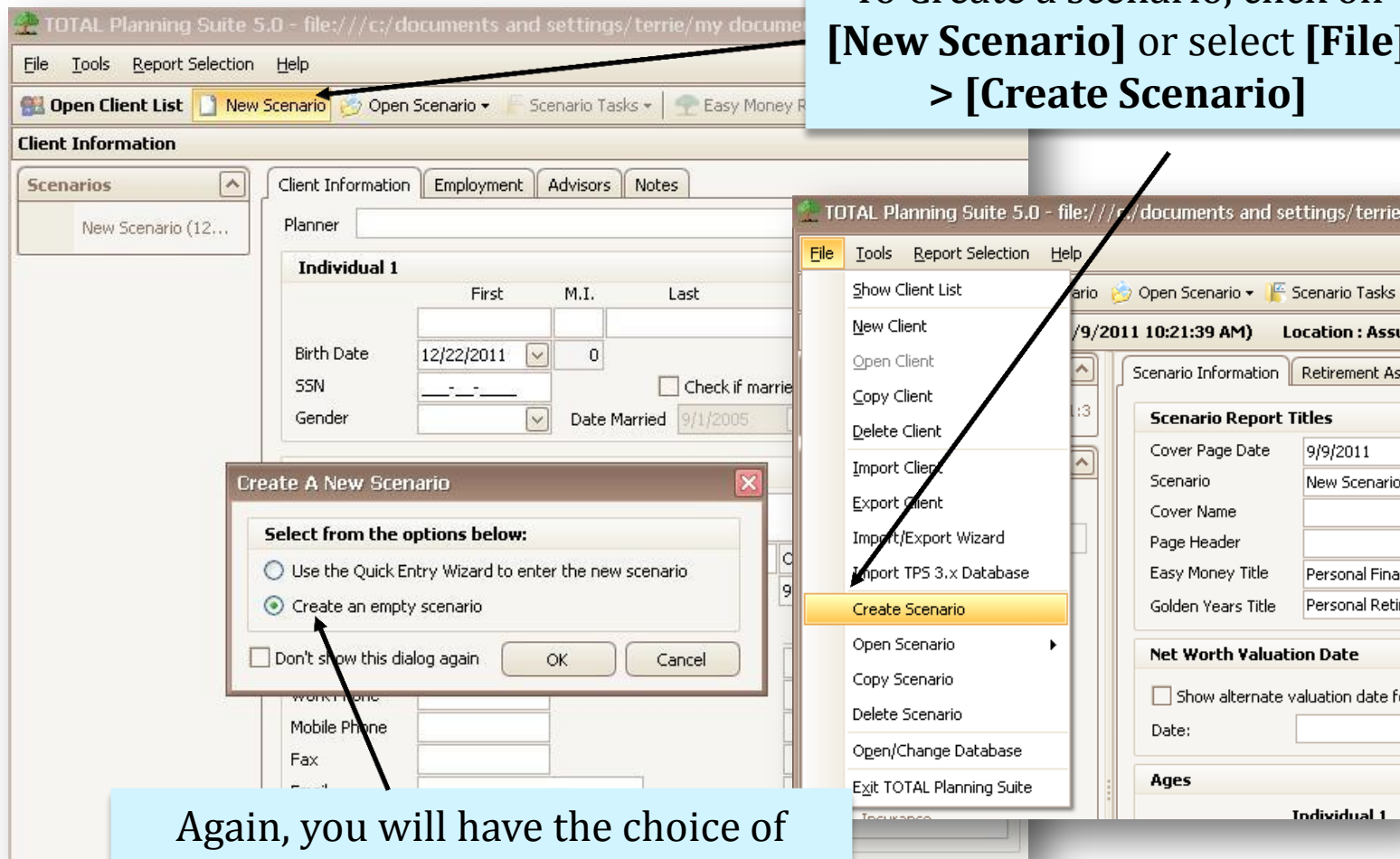
Client Created

Client created successfully.

OK

Create a New Scenario

To Create a scenario, click on
[New Scenario] or select **[File]**
> **[Create Scenario]**



Client Information and Scenarios

TOTAL Planning Suite 5.0 - file:///c:/documents and settings/terrie/my doc

File Tools Report Selection Help

Open Client List New Scenario Open Scenario Scenario Tasks Easy M

Client Information

Scenarios
Retire at 65
Real Estate

Client Information Employment Advisors Notes

Planner

Individual 1

	First	M.I.	Last
	Allen		Abbott
Birth Date	3/5/1960	51	
SSN	222-11-4444	<input checked="" type="checkbox"/> Check if married	
Gender	Male	Date Married	11/8/2004

Address & Phone

Home Address	1234 Fifth St.		
City, State	Corvallis	Oregon	
Zip	97330		
Individual 1			
Home Phone	555-123-4567		
Work Phone	234-5678		
Mobile Phone			

Individual 2

Account Type

- ☒ Active
- ☐ Business
- ☒ Client
- ☐ Other
- ☐ Personal
- ☐ Under Management

Edit Account Types

Scenario Information

TOTAL Planning Suite 5.0 - file:///c:/documents and settings/terrie/my documents/money tree software/total planning system/data.vdb4

File Tools Report Selection Help

Open Client List Copy Scenario New Scenario Open Scenario Scenario Tasks Easy Money Report Golden Years Report Express Reports

Scenario Name: Retire at 65 Location: Assumptions Previous Next

Select Scenario

- Retire at 65
- Real Estate

Data Entry

Allen Abbett

- Assumptions
- Asset Details
- Asset Summary
- Dependents
- Estate
- Income
- Tax Data
- Liabilities
- Insurance
- Personal Expenses
- Rental Real Estate
- Survivor
- Stock Options

Scenario Information Retirement Assumptions Surplus Allocation Other Assumptions Report Options

Scenario Report Titles

Cover Page Date: 1/10/2011

Scenario: Retire at 65

Cover Name: Allen and Betty Abbett

Page Header: Securities offered by Asset Advisors - a Registered Investment Advisor

Easy Money Title:

Golden Years Title:

Net Worth Valuation Date

☐ Show alternate valuation date for Net Worth report

Date: 12/31/2010

Ages

	Individual 1	Individual 2
Retire Age	65	65
Life Exp	97	97
Alt Life Exp	91	90

Allen Age: 51 Retire Age: 65 Life Expectancy: 91 Phone: 555-123-4567 Betty Age: 49 Retire Age: 65 Life Expectancy: 90

Each input page may have a number of tabs for additional input.

The tabs are different for each input page.

The input pages will be listed on the left. Click on a name and that page will be displayed.

Scenarios cont.

TOTAL Planning Suite 5.0 - file:///c:/documents and settings/terrie/my documents/money tree software/total plan

File Tools Report Selection Help

Open Client List Copy Scenario New Scenario Open Scenario Scenario Tasks Easy Money Report Golden Years

Scenario Name : Retire at 65 Location : Assumptions

Select Scenario

- Retire at 65
- Real Estate

Data Entry

- Allen Abbett
- Assumptions
- Asset Details
- Asset Summary
- Dependents
- Estate
- Income
- Tax
- Liabilities
- Insurance
- Personal
- Retirement

Scenario Information Retirement Assumptions Surplus Allocation Other Assumptions Report Options

Scenario Report Titles

Cover Page Date 1/10/2011

Scenario Retire at 65

Cover Name Allen and Betty Abbett

Page Header Securities offered by Asset Advisors - a Registered Investment Advisor

Easy Money Title

Golden Years Title

Net Worth Valuation Date

☐ Show alternate valuation date for Net Worth report

Date: 12/31/2010

Individual 1	Individual 2
65	65
97	97
91	90

The scenario name you have entered will be shown in the panel with it's own list of input windows.

Scenario Selection

Scenarios

- Retire at 65
- Real Estate

Client List

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	12/23/2011	

Scenarios

- Retire at 65
- Real Estate

1 Clients

Once you have selected a client from the **Client List**, you will be able to select the scenario you want to use from this list.

You can also load a client and scenario at the same time from the **Client List**

Manage Scenarios

Use the **[Copy Scenario]** button to create a new scenario using data from an existing scenario.

All data from the existing scenario will be copied to the new one.

You can also Delete Scenarios using the **[Delete Scenario]** buttons.

Tip: You can also manage Scenarios from the **Client List**

Client List

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
Abbett	Allen	555-123-4567		234-5678	9/15/2011	
Roth	Tra				9/15/2011	
Sample	John				9/9/2011	
Smith	Sue				9/15/2011	
Will	Bill				9/15/2011	

Scenario Report Titles

Cover Page Date: 1/10/2011

Scenario: Retirement at 65

Cover Name: Allen and Betty Abbett

Page Header: Securities offered by Asset Advisors - a Registered Investment Advisor

Easy Money Title

Golden Years Title

Scenarios

New Scenario (9/9/2011) Create Scenario

New Scenario (9/15/2011) Copy Scenario

New Scenario (9/15/2011) Delete Scenario

Allen Age: 51 Retire Age: 65 Life Expectancy: 91 Phone: 555-123-4567 Betty Age: 49 Retire Age: 65 Life Expectancy: 90

**End of
Client and Scenario
Tutorial**