



CLIENT CONSOLE NAVIGATOR

The eStatePlan™ platform incorporates a team of professionals to support you at all levels of your eStatePlan experience who are the **(i)** Client Management Services (CMS) office, your **(ii)** Advisor of Record, and the **(iii)** Attorney of Record. Your team will help you establish your eStatePlan, which you can personally monitor and control at all times. If you forget everything else concerning your Client Console, just remember this...

ANYTIME YOU NEED ASSISTANCE, SCROLL (ON THE LEFT SIDE COLUMN) TO THE **DATA EXCHANGE** MENU BAR AND CLICK THE "**NOTEPAD CENTER**" PORTAL; USE THE TEXTBOX ON THAT PAGE TO TYPE IN YOUR QUESTION / REQUEST FOR ASSISTANCE. THEN CLICK THE "**SUBMIT NEW NOTE**" BUTTON. YOU CAN EXPECT TO RECEIVE A NOTEPAD RESPONSE NORMALLY WITHIN TWENTY-FOUR BUSINESS HOURS.

To utilize/modify your Dynamic Trust Portfolio:

Go to the "**Data Exchange**" menu bar, click the "**Data Entry**" tab, and then click the "**View/Edit Data**" button on the right frame page. Once in the Data Entry page, simply enter and/or remove the data you wish to add or delete (from your Dynamic Trust Portfolio), then scroll to the bottom of the page and click the "**Submit/Process**" button. If you make entries in Section 8 of the Data Entry page, that body of text will show in either the "**Custom Trust Directives**" section of your Dynamic Trust Portfolio or in the "**Custom Trust Directives w/ESIGN**" (addendum) button.

To view/download your Dynamic Trust Portfolio:

Go to the "**Document Depot**" menu bar and click the "**Dyn/Trust Portfolio**" tab. That will bring up the "**Dynamic Trust Portfolio**" page where you will see several buttons connected to documents comprising The eStatePlan including the "**Dynamic Trust Portfolio**" button. Click that button and go to the Index Page (3rd page in the Portfolio) where hyperlinks are posted. You may use those links to send your browser directly to a particular section or sub-document in the Portfolio. [Cont.]

To utilize/modify your Funding Kit:

Go to the "Data Exchange" menu bar, click the "Funding Kit" tab, and then click the "Asset Entry Pages" button. Select the asset type from the horizontal menu bar (or from the Index Table) and enter in the appropriate information on the entry field and/or textbox of that module. When you go on to any another page or click the "Continue" or "Return to Console" buttons, the asset data you entered will be saved.

To assign/transfer assets to your Trust:

Go to the "Data Exchange" menu bar, click the "Funding Kit" tab, and then click the appropriate ESIGN button. Notice, for example, on the "ESIGN for Assets Transfer" button that there are several line items listed. The ones checked have been activated with the asset identification you made in those sections of the Data Entry Pages module. When you click the "Electronic Signature" button on the ESIGN page, you will have **legally "assigned"** (and informally transferred) that checked list of assets to your trust. You may modify any module of the Data Entry Pages section at any time to update your Funding Kit to always keep it current; that is the goal. And you are NOT REQUIRED to [re]ESIGN each time you make or delete an entry.

To utilize/modify your PostScript Page:

Go to the "Document Depot" menu bar and click the "PostScript Page" tab. There are several sections in your PostScript Page that provide you with a specific location to enter related information. Always remember to click the "Update PostScript Page" button to record any modifications you make in your PostScript Page.
