

# ***FlexDraft***<sup>®</sup>

## **Estate Planning Document Assembly System**

# **Tutorial**

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for *FlexDraft* v. 2012.01 (5/1/2012)

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# FlexDraft® Tutorial<sup>1</sup>

## 1. Introduction

### 1.01 Description and Purpose of the Tutorial

This tutorial guides you through the preparation of an estate plan for Ward and June Cleaver using *FlexDraft*. Its purpose is to introduce you to *FlexDraft*. After you complete this tutorial you should be ready to begin preparing *FlexDraft* estate planning documents for your own clients.

### 1.02 Before you Begin

**Before you can use this tutorial, you must install and setup *FlexDraft* (and your word processor).**

For brief instructions see the *FlexDraft* Quick Start Manual; for detailed instructions, see the *FlexDraft* Getting Started Manual. You can download both from [www.FlexDraft.com](http://www.FlexDraft.com) (User's Area). If *FlexDraft* has already been installed you can open them from the *FlexDraft* program group:

Click **Start** - All Programs - FlexDraft - FlexDraft Quick Start Guide

or

**Start** - All Programs - FlexDraft - Getting Started with FlexDraft

### 1.03 Network Installations—Special Note

In the preceding section and in most of the rest of this tutorial, it is assumed that *FlexDraft* was installed in a single user configuration, and that all files and folders are on the C: drive in the default installation directory (e.g., *FlexDraft* documentation is presumed to be in the C:\FlexDrft\Document\ directory).

If *FlexDraft* has been installed on a network drive, then you should generally substitute the network drive letter for C:. For example, if you installed *FlexDraft* on a network drive that is mapped to the letter H:, the *FlexDraft* documentation would be in H:\FlexDrft\Document\.

## 2. Preliminaries

### 2.01 Terms and Synonyms

Take note of the following synonyms:

- **“CAPS User” and “WinCaps” are just 2 names for the same program, CAPS User for Windows, which is the “engine” or “platform” on which *FlexDraft* runs. (Just as a**

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<sup>1</sup> This manual has been updated for the 2012 release. Most of the screen shots are taken from the 2011 release; however, where the changes are substantial the screen shots have been updated.

spreadsheet application runs in Excel or a web site runs in Internet Explorer, *FlexDraft* runs in CAPS User.)

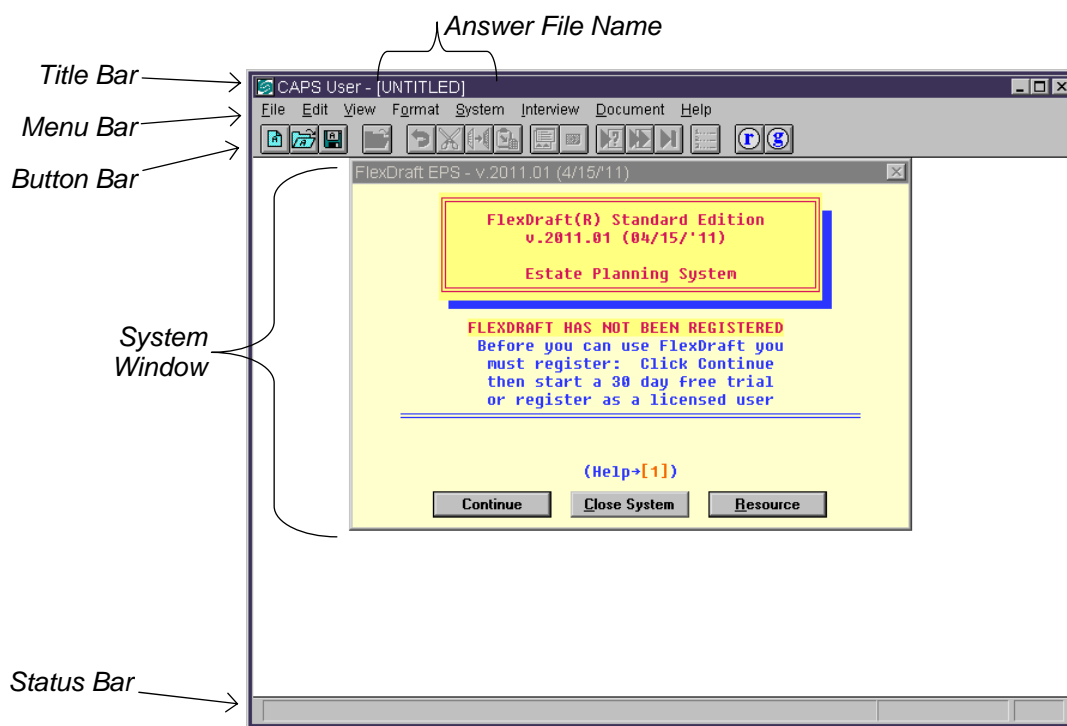
- **“Frame,” “Window” and “Dialogue Box”** are all mostly synonymous. Each refers to slightly different version of the same thing: a step displayed in a “dialogue,” a discrete bit of information being displayed, etc.

## 2.02 Start FlexDraft

Start *FlexDraft* by double clicking the *FlexDraft* icon on your desktop. (See the Getting Started Manual for other ways to start *FlexDraft*.)

## 2.03 Get to Know the CAPS User & FlexDraft Screens

When you start *FlexDraft*, you'll be looking at the *FlexDraft* Welcome Screen.



Before continuing, take a moment to familiarize yourself with the basic elements of CAPS User and *FlexDraft*:

- The **“CAPS User Title Bar”** is the bar at the top of the CAPS User program window; on the left side it displays the CAPS User icon followed by the words “CAPS User –” and the name of the current client Answer File (currently “[UNTITLED]”) and on the right it displays the standard minimize-maximize and close buttons you see in all Windows programs.
- The **“CAPS User Menu Bar”** is right below the Title Bar. It lists CAPS User’s command menus.
- The **“CAPS User Button Bar”** is right below the Menu Bar. Each button provides a shortcut to a specific CAPS User command. To see a button’s name, point to it with the

mouse (without clicking it): The button's name will pop-up next to the mouse and a brief explanation of the button's function will display in the Status Bar (discussed below).

- The “**CAPS User Status Bar**” is the bar at the bottom of the CAPS User program window. The Status Bar displays “**Unanswered**” if a frame contains an unanswered question, “**Reanswer**” if a frame contains answers that are logically inconsistent, and “**Warning**” if a frame has a warning associated with it. It also describes the function of any Button or Menu command you point to with the mouse.
- The “**FlexDraft System Window**” is the window or “frame” in the middle of the screen.
  - Its Title Bar displays the words “**FlexDraft EPS**” and the version number and release date of your copy of *FlexDraft*.
  - The body of the system window displays your firm name (unless you have the free trial version) and a brief summary of the status of your FlexDraft license.
  - At the bottom of the *FlexDraft* System Window are 3 buttons:
    - The **Continue** button is self explanatory. (Virtually every window in *FlexDraft* has one or more buttons that help you move around in the program, like **Continue**, **Next**, **Previous**, **Select**, etc.).
    - The **Resources** button is on every *FlexDraft* frame (window) that has any “Resources”.

**Resources contain explanations, suggestions, warnings and general info. Resources are your best source for help when using FlexDraft.**

Resources pertaining to a specific field or other item on the frame often appear as an orange, bracketed number, such as “[1]”. To open one of these “local Resources” double-click on its number.



*Whenever there is one, the best way to get quick, context sensitive help for a particular question or remark is to double-click its orange bracketed Resource – “[n]”.*

To list all Resources available for a particular frame, click the **Resources** button in the frame or click the resource button in the CAPS User Button Bar.



- The **Close System** button is evil! **NEVER CLICK THIS BUTTON!** Clicking it closes the *FlexDraft* system but leaves the CAPS User program open – which leaves you in a completely useless circumstance. (I’ve tried to get rid of it but can’t; it’s an integral part of the CAPS User program.)

If you do click this button—

- try clicking the Open System button on the Button Bar (which should become active once the *FlexDraft* System is closed); when the **Open System** window opens double-click



**FlexDraft EPS** (which will be listed –if you’re lucky), and FlexDraft should re-open; *otherwise*

- Close the CAPS User program and then re-start FlexDraft.

## 2.04 Never “Close” FlexDraft

OK, I’m repeating myself. But this is important if you want to avoid harmless yet annoying headaches.

**Never click the  button. Never close the FlexDraft system.**



You cannot create a new Answer file when the *FlexDraft* system is closed, because every Answer file must be associated with a specific System.

Oftentimes you will not be able to open an existing Answer file when the *FlexDraft* system is closed. This is because an Answer file is sometimes unable to locate the *FlexDraft* system if the system is closed (however, this is generally a problem only in network installations).

**If you want to exit FlexDraft you should simply close CAPS User.**

## 2.05 Create a New “Answer File”

*FlexDraft*’s end product is word processor files (Wills, trusts, etc.). In the meanwhile, *FlexDraft* uses separate “Answer Files” to store client and document information for later use and/or revision. Each client has an Answer file. To create a new Answer file when there is no current Answer file in use:

- First, be sure the *FlexDraft* System is open. (See part 2.04, “Never “Close” *FlexDraft*,” at page 6 of this tutorial.)
- Click the **Save Button** on the Button Bar; it’s the one that looks like a diskette with the letter “A” on it. The “Save Answers” dialogue box will open. 
  - Look on the right side of the dialogue box to see the directory *FlexDraft* is using for Answer Files; make a note for future reference. (It should indicate **C:\FlxDrft\Answer**; in a network installation, substitute the network drive letter for **C:**.)
  - In the **File Title** field type: **Cleaver, Ward & June**
  - In the **File Name** field type: **CleaverW**
  - Click . The dialogue box will close. You have just created an Answer file for your new clients, Ward and June Cleaver.
- Look at the CAPS User Title Bar. “[UNTITLED]” has changed to “[Cleaver, Ward & June].”

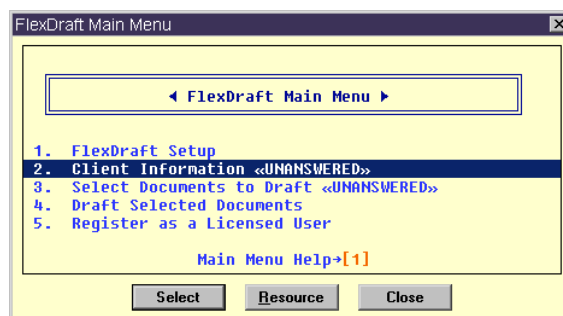


*The Title Bar will always show the name of the current client Answer file.*

## 2.06 Get to the Main Menu

The *FlexDraft* main menu is the starting point for most of the work you will do in *FlexDraft*. To get there:

- Click the **Continue** button at the bottom of the *FlexDraft* System window.
- The **FlexDraft Main menu** will appear. You are now ready to fill in the Cleavers' family information.



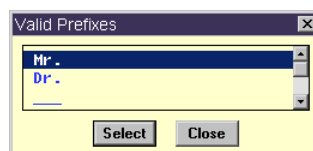
## 3. Fill in Client Information

*Note:* Unless the attorney will be handling it personally, he/she should yield the chair to the paralegal, secretary or associate who will be filling in client information.

- At the Main menu, double-click **Client Information «UNANSWERED»**. The Client Information Dialogue will begin.
- Click **m** to indicate Ward's gender; click **y** to indicate his marital status.



- Click **Next** to proceed to the “**Husband Name**” frame:
  - Right-click the “prefix” field then double click **Mr.** to paste “Mr.” into the prefix field.



- Type “**Ward**” for “First”.
- Tab to the "Middle" field and type "**m.**" then tab to the “Last” field and type “**Cleaver**”.

Note that *FlexDraft* guessed his Initials for you.

- Tab to the “Birth Date” field and type “10-28-1947”. *Be sure to type all 4 numbers for the year.*  
*Note that when you leave the Birth Date field, FlexDraft converts this to a properly formatted text-form date.*
- Click **y** to indicate that Ward is a US citizen.
- *Example:* When you're finished, the “Husband Name” frame might look like this:

2. Husband Name

prefix: Mr.

First: Ward

Middle: M.

Last: Cleaver

suffix:

title:

Initials: WMC

Born: Oct 28, 1947 (age 63)

US Citizen: Y  N

- Click **Next** to proceed to the “Wife Name” frame.
- Right-click the “prefix” field; double-click **Ms.** to paste “Ms.” into the prefix field.

Valid Prefixes

Ms.

Mrs.

Dr.

Select Close

*Note that, the prefix list shows only female prefixes.*

- Type “**June**” for “First” and “**A.**” for “Middle” *but don't fill in her last name yet. Instead—*
- Right click the “Last” field and double-click “Cleaver” to paste in her last name.

Valid Spouse Lst Names

Cleaver

Select Close

*This is no big deal for a name like Cleaver, but it's nice for longer, more difficult names. Note that FlexDraft guessed her Initials too.*

- “Birth Date” should still be blank. **Before you continue**, look at the CAPS User Status Bar at the bottom of the CAPS User program window. It should display “Unanswered.”

Unanswered

- Click **y** to indicate that June is a US citizen.

**Try This** ➔



- **Note:** When you answered the question on June’s citizenship, “Unanswered” disappeared from the Status Bar, even though “suffix”, “title” and Birth Date” are still blank. This is because those questions are not *required* questions (i.e., they can be left unanswered).

A frame is **Unanswered** only if a **required** question is unanswered. Likewise, when a frame is not **Unanswered**, it means the unanswered questions on that frame are *not* required.

Try This ➔

- Click on the "Birth Date" field and type "1 9 49"; this time *don't type in a 4 digit year, just type a 2 digit year, and just use spaces instead of dashes between the date parts*. Then tab out of the "Birth Date" field. *Note 3 things:*
  - FlexDraft recognizes dates with hyphens (1-9-49), slashes (1/9/49) or spaces (1 9 49) and converts them to a text date format (January 9, 2049).
  - FlexDraft converts a 2-digit year to a 4-digit year *presuming it's this century*—which isn't always correct.
  - When a birth date seems way out of line; e.g., when you appear to be saying that June hasn't been born yet, FlexDraft asks you whether you want to switch the date to the previous century. It also adds a **Warning** button and the word “Warning” to the Status Bar display.

3. Wife Name

prefix: Ms.

First: June

Middle: A.

Last: Cleaver

suffix:

title:

Initials: JAC

Born: Jan 9, 2049 (age -37)  y  n **Warning** Don't you mean 1949?

US Citizen:  y  n

- Click **y** to indicate that you *do* mean 1949 and FlexDraft adjusts the date automatically. (The **Warning** status and the **Warning** button also both go away.)
- In the next field click “**y**” to indicate that June is a US citizen.
- Click **Next** to proceed to the “Additional Name Details” frame.
  - **Before you click** either **f** or **i** to select formal or informal salutations, double-click the orange “[1]” after “Salutations”. A “Resource” explaining the “Formal or Informal Salutations” question will appear. When you’re done with the Resource, click **Close**.
  - Click **i** to indicate that you are on a first name basis with the Cleavers.
  - FlexDraft makes its best guess for full names, forms of address, and salutations. (To learn about full names, forms of address, and/or salutations, double-click the

appropriate orange numbered Resource.) **Note:** These are only suggestions. *You can revise any of them if you like.*

- *Example:* When you're finished, the “Additional Name Details” frame might look like this:

- Click **Next** to proceed to the “Additional (Other/Former) Names” frame.
  - Left-click **n** 4 times to indicate that neither Ward nor June has any other or former names.
  - For clients that do have "a/k/a" or "f/k/a" names, you can click **y** and then indicate the additional names. To learn more, double-click the orange “[1]” on the “Additional (Other/Former) Names” frame to display the Resource “Specifying additional names”.

*Note:* If you specify default answers for these Additional Name questions in Setup – Default Answers, the answers you specify will already be filled in.

- Click **Next** to proceed to the “Home Address” frame.
  - For “Street”, type “2122 Winding Rose Drive”; leave the second “Street” field blank.
  - Right-click the field for “City” and the cities you entered during FlexDraft Setup will appear. Double-click on any city to paste it in.
  - Do the same for “County”.
  - Tab to the “State” field. Type the letter “t” and then tab again. FlexDraft assumes you mean “Texas” and fills it in for you.
  - Make up and fill in a Zip code and phone number.
  - Click **y** to indicate that Ward and June have the same residence address.
  - *Example:* When you're finished, the “Home Address” frame might look like this:

6. Home Address

Husband's Home Address:


Street: 2122 Winding Rose Drive

City/County: Houston Harris

State/ZIP: Texas 77777

Home Phone: (713) 111-2222

y  n Do husband and wife have the same home address?[1]

- Click **Next** to proceed to the “Children” frame.
- Click **y**; then right-click the “How Many” field and double-click “2” to paste in the number of children.
- **Before you click y or n**; again, click the Resource Button in the CAPS User Button Bar. *A list of all Resources for this frame will appear.* Double-click “Whether to Specify Birthdays” and that Resource will appear. Click **Close** when you’re done with the Resource and click **Close** again to close the “Resources” frame. 
- Click **y**; to specify birthdates and click **y**; again to indicate that additional children are possible.
- Click **Next** to proceed to the “First Child” frame.
  - For “Name” type “Wallace Cleaver” and for “Born” type “3 21 1977”. Then click **m** to indicate his gender. Note that, when you left the “Born” field, FlexDraft automatically converted his birthdate to “March 21, 1977”.
  - Indicate that Wally is a child of “Both” and that he resides “at home” (with Ward and June).
- Click **Next** to proceed to the “Second Child” frame. Enter “Theodore Cleaver”, born “5 31 1983”, “male”, child of “both”, resides “at home”.
- Click **Next** to proceed to the “Other People Involved in the Estate Plan” frame. Click **y** and indicate that you’ll name 2 other people.
- Click **Next** to proceed to the “First Named Person” frame.
  - Click **i** for “Individual”, fill in “Mike Smith”, a male, and make up and fill in an address and phone number. Remember that you can lookup and paste City, County and State.
- Click **Next** to proceed to the “Second Named Person” frame.
  - Click **c** for “Corporate”, fill in “Big Trust Company”, and make up and fill in an address and phone number.

- Click **Next** to proceed to the “Attorney in Charge” frame.
  - If you are using an Evaluation copy of *FlexDraft* or if you have a single attorney license, *FlexDraft* fills in this frame for you using your Setup information.
  - If you have a multiple attorney license, right click the “Attorney in Charge” field and paste in any attorney’s name that you entered during *FlexDraft* Setup. Note that *FlexDraft* fills in the rest of this frame for you.
- Click **Next** to proceed to the “Save Answers” frame.
  - Click **y** to indicate that you want to save your answers. (In the rare case in which you do not want to save your answers, click **n**. For example, if you have changed certain answers simply to see the effect, or if you intend to save the answers in a new Answer File, leaving the original Answer File unchanged, you would *not* want to save your answers.)
- Click **Next** to save your answers and finish with the Client Information dialogue; the “End of Interview” frame will appear with a summary of the dialogue you just completed. There should be 0 unanswered frames.
- Click **Next** again to return to the [FlexDraft Main menu](#).

**Note:** Now that the [Client Information](#) dialogue has been fully answered, its menu option is no longer denoted “«UNANSWERED»”.

## 4. Select Documents to Draft

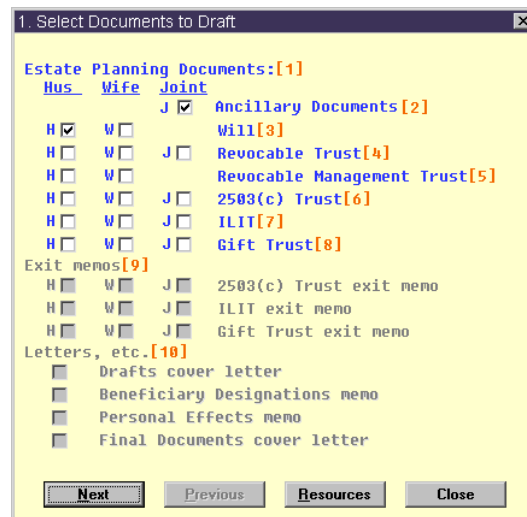
**OK:** *If the attorney (or paralegal) who’ll be drafting documents wants a turn at the computer, now is a good time for him or her to take the controls.*

- At the [FlexDraft Main menu](#), double-click [Select Documents to Draft](#). The “[Select Documents to Draft](#)” frame should appear. *If a “Client Information Incomplete” frame appears instead, you should click **Close**, return to the Client Information dialogue and provide the missing information—unless you’re sure you want to proceed anyway (e.g., because you know the only unanswered field is, say, a child’s birth date, and you plan on filling it in later), in which case you can click **y** to continue anyway, and then click **Next**.*

**Note:** If you want a description of a particular document, double-click the bracketed orange Resource number “[n]” next to the particular document, or click the **Resources** button at the bottom of the frame and a list of all Resources on this frame will pop up. (This is yet another way to access Resources.)

- Under the “Joint” column, click the check-box for “Ancillary”.
- Under the “Hus” column, click the check-box for “Will”.

- *Example:* When you're finished, the “Select Documents to Draft” frame might look like this:



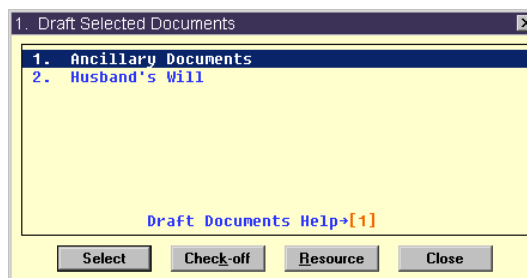
- Click either **Close** or **Next** to return to the FlexDraft Main menu.

## 5. Draft Ancillary Documents

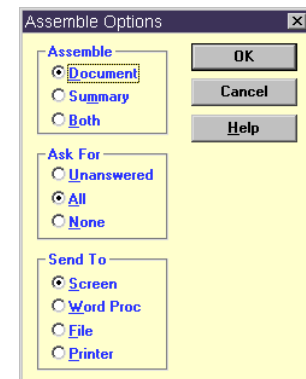
Now you're ready to begin the actual document drafting process. We'll start with the “Ancillary” documents usually prepared in conjunction with the Wills.

### 5.01 Assemble Options

- At the **FlexDraft Main menu**, double-click **Draft Selected Documents** to open the **Draft Selected Documents** window.
- At the **Draft Selected Documents** window double-click **Ancillary Documents**.



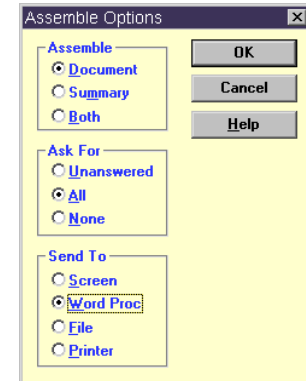
- The “**Assemble Options**” dialogue box will appear. You should always pick “**Document**” for the *Assemble* option and “**All**” for the *Ask For* option. The choices you make for the *Send To* option depends on your personal preferences and your word processor setup.
  - **Send to Screen.** When you “send an assembled document to the screen”, FlexDraft enables you to: review the fully assembled document, double-check your answers, change 1 or more answers and reassemble your document, etc., *before exporting the finish product to your word processor.* This is



my personal preference because it helps me catch and fix mistakes I make in FlexDraft before I do any custom drafting in my word processor.

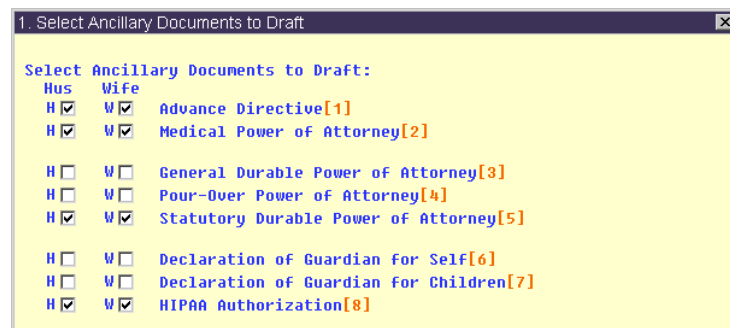
If you want to send an assembled document *to the screen*, be sure the “Assemble Options” dialogue box indicates: Assemble “Document”, Ask For “All”, and Send To “Screen”. Then click **OK**.

- **Send to Word Proc.** When you “send an assembled document *to the word processor*”, FlexDraft sends the assembled documents directly to the word processor specified in your Word Processor Preferences. You won’t see the document displayed on screen (though you may be asked to answer 1 or more unanswered questions). Instead, FlexDraft will automatically open the assembled document in your word processor. This *used to* be my preference because it’s quick and easy, but I now prefer “send to screen” because it helps me draft more accurately. Also, “send to word processor” is not available if you use any unsupported word processor (i.e., something other than Word or WordPerfect).



If you want to send an assembled document *to your word processor*, be sure the “Assemble Options” dialogue box indicates: Assemble “Document”, Ask For “All”, and Send To “Word Proc”. Then click **OK**.

- **Avoid Other Send to Options.** I recommend against using Send to file (as noted below, if you want to send to file it’s easy to do so after you’ve reviewed a document that was initially sent to the screen). And the Send to printer option, in my experience, simply never works properly.
- The “Draft Ancillary Documents” frame will appear when you leave the “Assemble Options” frame. Click the check-boxes under both “Hus” and “Wife” for: “Advance Directive”, “Medical Power of Attorney”, and “Statutory Durable Power of Attorney”.



## 5.02 Directives

- Click **Next** to proceed to the “Husband’s Directive” introductory frame. Click **Next** again to proceed to the “Husband’s Directive- Basic Info” frame. Click **y** to indicate that you will include the "Agent to Decide" option. To see an explanation of this option, double-click the orange resource number “[1]”.

3. Husband's Directive-Basic Info

Include "Agent to Decide" option[1]

- Click **Next** to proceed to the “**Husband’s Directive-Signing Details**” frame. *FlexDraft* assumes that Ward will sign it at your office sometime this year.

4. Husband's Directive-Signing Details

Signing will be at our office

To be signed on    Month:     Year: 2012

Proof will be by:     Notary[1]     Witnesses[2]

To be signed in    County: Harris    State: Texas

- Select whether the proof will be by a notary or by witnesses. (My personal preference is “Notary”.) Click **Next**.
- Repeat the above steps for June’s Directive.

### 5.03 Medical Powers of Attorney

- Click **Next** to proceed to the “**Husband’s Medical Power**” introductory frame. Click **Next** again to proceed to the “**Basic Info for Husband’s Medical Power**” frame. Click **wife** to indicate that June will be the initial agent; then indicate that there will be **2** successor agents.
- At the bottom of the frame, select your preferred method of proof – either **Notary** or **Witness**. Note that all the other options are –pre-answered. Look over them but don’t change them just yet.

6. Husband's Medical Power-Basic Info

Initial Named Agent is:.....  Wife  
 Other

How Many Successor Agents?..... 2  
 (enter "0" for none)

Limitations on Agent's Authority?..  no  
 yes

Specified expiration date?.....  no  
 yes

To be signed:.....  at our office  
 elsewhere

Additional Copy Holder?.....  No  
 (in addition to attorney)     Yes

To be signed in Month, Year:..... , 2012

Proof will be by:.....  Notary[1]  
 Witnesses[2]

- Click **Next** to proceed to the “**Husband’s Medical Power Agent(s)**” frame. Right-click the “Name” fields to paste in Wally as first alternate and the Beaver as second alternate.

10. Husband's Medical Power-Agent(s)

Alternate Agents (in order of succession):

Name: Wallace Cleaver  
 Address: 2122 Winding Rose Drive [1]  
 City: Houston  
 State: Texas  
 ZIP: 77777  
 Phone: (713) 111-2222

Name: Theodore Cleaver  
 Address: 2122 Winding Rose Drive [2]  
 City: Houston  
 State: Texas  
 ZIP: 77777  
 Phone: (713) 111-2222

Next Previous Resources Close

- Click **Next** to proceed to the “[Details for Husband’s Medical Power](#)” frame. *FlexDraft* assumes that the Attorney in charge will have a copy.
- Click **Next**.
- Repeat the above steps for June’s Medical Power.

## 5.04 Statutory Durable Powers of Attorney

- Click **Next** to proceed to the “[Husband’s Statutory POA](#)” introductory frame. Click **Next** again to proceed to the “[Husband’s Statutory POA-Agents](#)” frame. Choose the first option (Sole Agents).

17. Husband's Statutory POA-Agents

Type of Agent Appointment/Succession (pick one option):

Sole Agent [with 1 or more successors]  
 Co-Agents [with 1 or more successors]  
 Sole/Co Agent succeeded by Co-Agents

- Click **Next** to proceed to the “[Husband’s Statutory POA-Sole Agents](#)” frame. Indicate that **3** agents will be named, then name June, Wallace and Theodore (in that order).

18. Husband's Statutory POA-Sole Agents

How many sole agents will be named: 3

1st: Name: June A. Cleaver  
 Gender: F  
 Street: 2122 Winding Rose Drive [1]  
 City: Houston  
 State: Texas  
 ZIP: 77777  
 Phone: (713) 111-2222

**Note:** Only 1 agent fits on the first screen; after you enter June as the 1<sup>st</sup> Agent, click **Next** to go to the next frame and enter the Wally & the Beaver as the 2<sup>nd</sup> & 3<sup>rd</sup> Agents:



- Click **Next** to proceed to the “[Husband’s Statutory POA-Basic Info](#)” frame. *FlexDraft* makes certain assumptions (e.g., that Ward will sign it at your office sometime this year) which you can generally override. For explanations, double-click on the appropriate Resource (indicated by an orange, bracketed number, such as “[1]”).

- Click **Next**.
- Mostly repeat** the above steps for June’s Statutory POA; **however, when you get to the [Wife’s Statutory POA-Basic Info](#)” frame, don’t check “y” or “n” for “Initial Agent(s) will sign the POA”; instead, leave that field “Unanswered” (which will cause that frame to be “Unanswered as well). We’ll fix this later.**

## 5.05 HIPAA Authorizations

- Click **Next** to proceed to the “[Husband’s HIPAA Authorization](#)” introductory frame.

- Click **N** again to proceed to the “Husband’s [HIPAA Authorization-Authorized Persons](#)” frame. Indicate that **3** authorized persons will be named, then name June, Wallace and Theodore (in that order).
- Click **N** to proceed to the “[Husband's HIPAA Authorization-Basic Info](#)” frame. Click **n** to indicate that you will not include Ward’s birthday. *FlexDraft* assumes that Ward will sign it at your office sometime this year.

28. Husband's HIPAA Authorization-Basic Info

**N** Include Birthday

husband D.O.B:

To be signed in...Month:

Year: 2012

- Click **N**.
- Repeat the above steps for June’s Statutory POA.

## 5.06 Finish Up

- When you finish June’s Statutory POA and click **N**, and you’ll come to the “[Review/Modify Formatting Options](#)” frame. Click **n** to *not* modify your formatting options for the Cleavers’ documents.
- Click **N** again, and you’ll come to the “[Client Specific/OverRide-Format](#)” frame. Click **n** to *not* modify your formatting preferences for the Cleavers’ documents.

30. Client Specific/OverRide-Format

**N** OverRide Default Format options?

Default Format options are currently in effect.  
Select "Y" to specify Client Specific/OverRide format options  
to apply to this client only, in lieu of the Default format  
options.

- Click **N** again, and you’ll come to the “[Client Specific/OverRide-Drafting Pref's](#)” frame. Click **n** to *not* modify your drafting preferences for the Cleavers’ documents.

**Note:** *If you wanted to change your default document formatting and/or drafting preferences for the Cleavers, you could click **y** for either of the preceding. This would take you through the same frames you went through during the Formatting Setup and Drafting Preferences Setup, but this time you’d be in “Client Specific Mode.”*

**Any changes you made would affect only the Cleavers.** (To revise document formatting and/or drafting preferences defaults for *all* clients’ documents, you would use [FlexDraft Setup](#) from the [FlexDraft Main menu](#).)

- Click **N** and you’ll come to the “[Save Answers](#)” frame. Click **y** to save your work so far.


## 5.07 Fix the Unanswered Frame Problem

- Click **Next** and you'll come to the "End of Document Interview" frame. If you left a question unanswered (as suggested above), *it should indicate that there is "1 unanswered frames."*

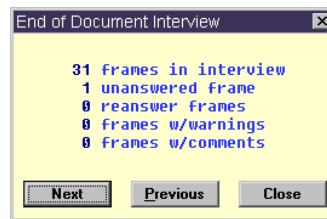


- You should always pause at the "End of Document Interview" frame to verify that there are no unanswered frames, because unanswered frames can cause all kinds of problems in the finished documents.**
  - Click **Next** and you'll get a warning frame.
  - Click **Next** again and you'll be viewing the finished document (assuming you picked "Send to Screen").
  - Click **Next** again and you'll be back at the [Draft Selected Documents](#) window.

*Now it's time to fix the "Unanswered Frame" problem.*

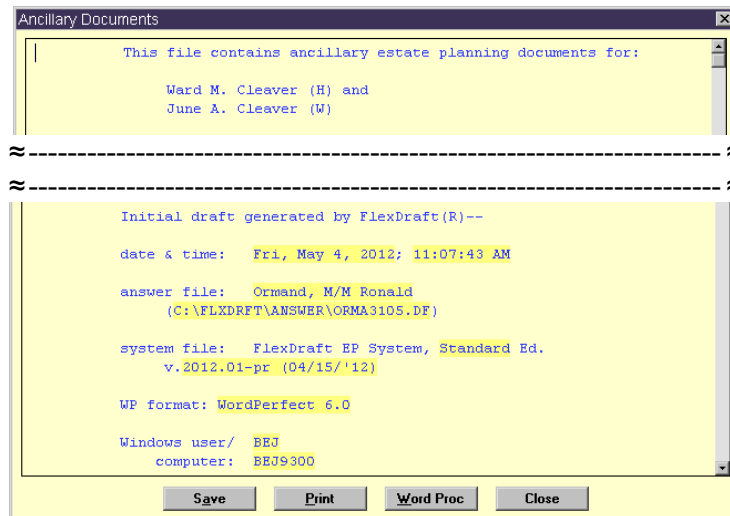
- At the [Draft Selected Documents](#) window begin the process again as if you were going to draft Ancillary documents again.
  - double-click [Ancillary Documents](#).
  - At the "Assemble Options" frame, pick the same options as before, then click **Next**.
- When the "Draft Ancillary Documents" frame appears, note that the "Next Unanswered" button in the CAPS User Button Bar is active. 
  - Without clicking, *point to the Next Unanswered button*. The button's name will display in a pop-up by the mouse, and the button's function will display in the Status Bar at the bottom of the CAPS User program window ("[Advances to the next unanswered frame](#)").
  - Left-click the Next Unanswered button.
    - You will immediately advance to the "[Wife's Statutory POA-Basic Info](#)" frame where you left the Unanswered field ("Initial Agent(s) will sign the POA").
    - Note that the Status Bar will be displaying the message "[Unanswered](#)".
  - Click "[y](#)" to answer the field. The Status Bar message will disappear.
- Left-click the Next Unanswered button again.
  - Every time you've gone back & fixed an Unanswered frame you should click the Next Unanswered button just in case there are more Unanswered frames that need attention.**
  - Of course, this time there should be no more Unanswered frames so . . .
- You should immediately advance to the [Save Answers](#) frame. Click [y](#) to save your work again.

- Click **Next** and you'll come to the “End of Document Interview” frame (again). This time it should indicate *that there are* “0 unanswered frames.”



## 5.08 Assemble the Documents

- Now, at the “End of Document Interview” frame, click **Next**. FlexDraft will assemble the Cleavers’ Ancillary Documents. The next thing you see depends on whether you chose *Send to Screen* or *Send to Word Proc* back at the “Assemble Options” dialogue box. (See part 5.01, “Options,” at page 13 of this tutorial.)
  - **Documents Sent to Screen.** If you chose to send the assembled Ancillary Documents to the screen, you’ll be looking at them in CAPS’ [Document Window](#).



At the [Document Window](#) you can review the fully assembled document, double-check your answers, change 1 or more answers and reassemble your document, etc., *before exporting the finish product to your word processor.*

- **Correcting Variables.** For example, locate “[Ward M. Cleaver](#)” at the top of the first page. *All variables should be highlighted.*

(*Note:* If names & other variables aren’t highlighted, select [File - Preferences - Colors](#) from the CAPS User menu bar; this opens up the [Color Options](#) dialog box. Under *Type of Text to Color* select [Data](#), then set the color options you want for variables in documents.)

- Double-click [Ward M. Cleaver](#) and the “[Additional Name Details](#)” frame will open.
- Change his Full name from “[Ward M. Cleaver](#)” to “[Chuck M. Cleaver](#)” and then click **Next**.

- At the dialog window that opens up Click  **Yes** to “**Reassemble with Modifications**”
- FlexDraft reassembles the document with “husband’s new name.

**But note:** “Husband’s” name is changed from Ward to Chuck but *other variables using Ward’s name (e.g., “wife’s agent”)* are still “Ward” unless and until changed directly.)

- Double-click **Chuck M. Cleaver** and change his name back to Ward, and click  **Next**, then  **Yes** restore Ward’s correct name.
- When you’re finished reviewing the documents
  - Click  **Word Proc** to send the document to your word processor. *OR*
  - Click  **Save** to save the document.
    - At the **Save Document** window verify that folder displayed under “Directories” is the one you wish to use to save FlexDraft documents (you can browse to the correct folder if necessary). (I prefer to use **C:\FlxDrft\ Document** for all FlexDraft documents.)
    - FlexDraft will propose a document name. Change it if you prefer, but do not change the file “extension” (the “WPD” or “RTF” at the end).
    - Click  **OK** and the document will be saved. Click  **Close** to exit the **Document** Window.
    - Using either Windows Explorer or your word processor, browse to the document and open it.
  - **Documents Sent to Word Proc.** If you chose to send the assembled Ancillary Document to your word processor, you should be looking at them in either Word or WordPerfect. At this point, they’re no longer FlexDraft documents, they’re word processor documents (albeit ones that were created with FlexDraft) and you should treat them like any other Word/WordPerfect documents for these clients: Save them in the client directory, edit them freely, etc.

\* \* \*


*This is a good time to take a break.*

Return to FlexDraft (CAPS User) if necessary and close the program: Click the  in the upper right hand corner of the CAPS User program window, and the program will shut down. (CAPS User will probably prompt you to save your Answers. If it does, click  **Yes**.)

## 6. Draft Ward’s Will

The following instructions guide you through the preparation of a “standard” Will for Ward with: a Marital Lead gift to a QTIP Trust; a residuary gift to a Bypass Trust; Children’s Trusts that vest in 2 stages, and Contingent Trusts. After you complete Ward’s Will, you should have a very well developed feel for FlexDraft.

## 6.01 Preliminaries

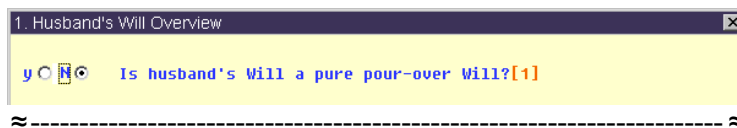
- Start *FlexDraft* by double clicking the *FlexDraft* icon on your desktop. (See the Getting Started Manual for other ways to start *FlexDraft*.)
- Be sure the *FlexDraft* System is “open.” (See part 2.04, “Never “Close” *FlexDraft*,” at page 6 of this tutorial.)
- Click the Open Button; it’s the one that looks like a blue file folder with the letter “A” on it—it should be the second button from the left. The “Open Answers”  dialogue box will open.
  - Look on the right side of the dialogue box to see the directory *FlexDraft* is using for Answer Files; it should be the same directory in which you saved the Cleavers’ Answer file (probably **C:\FlxDrft\Answer**).
  - In the **File Title** list double-click on *Cleaver, Ward & June*. The **Open Answers** dialogue box will close and the Answer file for Ward and June Cleaver will be loaded. “[*Cleaver, Ward & June*]” will be displayed in the CAPS User Title Bar.
- Get to the **FlexDraft Main menu**. (See part 2.06, “Get to the Main Menu,” at page 7 of this tutorial.)
- At the Main menu, double-click **Draft Selected Documents** and then double-click **Husband’s Will** in the menu that pops up. The “Assemble Options” dialogue box will appear.

## 6.02 Assemble Options

- At the “Assemble Options” dialogue box you should *always* pick “**Document**” for the *Assemble* option and “**A**ll” for the *Ask For* option. The choices you make for the *Send To* option depends on your personal preferences and your word processor setup. (See part 5.01, “Assemble Options,” at page 13 of this tutorial.)

## 6.03 Overview

- At the At the “Assemble Options” dialogue box click **OK** to proceed to the “Husband’s Will Overview” frame. Click **n** to indicate that this is *not* a pour-over Will.



- Click **Next** to proceed to the “Husband’s Will Overview—Tax Planning Options” frame. Click **y** for active tax planning then select **Marital Lead** tax planning. In Standard & Professional Edition, click **n** to *not* include “Passive GST” planning.

2. Husband's Will Overview--Tax Planning Options

**Active Tax Planning?** Will husband's Will include active tax planning?[1]

What Kind?

Disclaimer [2]

Marital Lead [3]

Credit Lead [4]

Marital/GST Combined [5]

Active GST Plan [6]

**Passive GST?** Do you wish to include passive GST tax planning provisions?[7]

- Click **Next** to proceed to the first “Husband’s Will Overview—Trusts Created” frame. Click **y** to indicate that trusts will be created & click **n** to *not* activate the “Advanced” option.

3. Husband's Will Overview--Trusts Created

**Trusts?** Will any Trusts [1] be created? (Even if only Contingent Trusts [2] will be created, answer Y.)

**Advanced (additional trusts)** [3]

- Click **Next** to proceed to the next “Husband’s Will Overview—Trusts Created” frame. Click **y** for Marital Trust. Accept the name “**Marital Trust.**”
- Then click **y** for **Family/Bypass Trust**. Accept the name “**Bypass Trust.**”

4. Husband's Will--Trusts Created

Marital and Family (Bypass) Trusts to be created:

**Marital Trust** [1]  
Name:

**Family/Bypass Trust** [2]  
Name:

- Click **Next** to proceed to the third (and final) “Husband’s Will Overview—Trusts Created” frame. Click **y** for Child’s Trusts. Accept the name “**Child’s Trust.**”
- Click **n** for both Grandchild’s Trust and Descendant’s Trusts. Click **y** for Contingent Trusts. Accept the name “**Contingent Trust.**”

5. Husband's Will--Trusts Created

Separate share trusts [1] to be created:

**Child's Trusts** [2]  
Name:

**Grandchild's Trusts** [3]

**Descendant's Trusts** [4]

**Contingent Trusts** [5]  
Name:

Now that *FlexDraft* knows which trusts you’re going to create, it’s ready to ask about the terms of those trusts. It collects information in reverse (starting with Contingent Trusts and finishing with the Marital Trust).

## 6.04 Terms of Contingent Trusts

- Click **Next** to proceed to the “Contingent Trusts” introductory frame. Click **Next** again to proceed to the “Husband’s Will-Contingent Trust Terms” frame. Specify:
  - **Ascertainable (HEMS)** Discretionary Distribution Standard
  - **1** Staged Terminating Distribution
  - **25** for the Termination Age
  - **no** Testamentary Limited Power of Appointment.

7. Husband's Will-Contingent Trust Terms

Terms of the Contingent Trusts:

Discretionary Distribution Standard:

Ascertainable (HMSE)

Nonascertainable (HMSE + "Other Purposes")

Number Of Staged Terminating Distributions:

Termination Age:

Testamentary Limited Power of Appointment?

y  n

## 6.05 Terms of Child’s Trusts

- Click **Next** to proceed to the “Child’s Trusts” introductory frame. Click **Next** again to proceed to the first of several “Husband’s Will-Child’s Trust Terms” frames. Select **[Staged] vesting trust**.

9. Husband's Will-Child's Trust Terms

Basic style of the Child's Trusts:

Lifetime trust

[Staged] vesting trust

Revocable management trust

- Click **Next** to proceed to the second “Husband’s Will-Child’s Trust Terms” frame.
  - Click **n** to indicate that the child is *not* the sole beneficiary.
  - Check **Child’s Descendants** as “additional” beneficiaries.

*Note the grayed out option; for an explanation, double-click the Resource “[1]”.*

- Select **Ascertainable (HEMS)** Discretionary Distribution Standard.

10. Husband's Will-Child's Trust Terms

Additional Beneficiaries of each Child's Trust (the child is always primary beneficiary):

NO additional beneficiaries

Child's Descendants

Child's Spouse

y  n  May the trustee consider the child's obligation of support?[1]

Discretionary Distribution Standard:

Ascertainable (HMSE)

Nonascertainable (HMSE + "Other Purposes")



- Click **Next** to proceed to the third “**Husband’s Will-Child’s Trust Terms**” frame. Select **No Optional Distributions**.

Again, note the grayed out options – for Home & Business distributions details – although no Resource is necessary: If you select Home & Business distributions the options are activated.

- Click **Next** to proceed to the fourth “**Husband’s Will-Child’s Trust Terms**” frame. Right-click the Number of Staged Distributions field and double-click **2**. Specify ages **25** and **30**.

- Click **Next** to proceed to the fifth and final “**Husband’s Will-Child’s Trust Terms**” frame. Click **y** to give each child a testamentary power of appointment. Select **Limited** and include as many permissible appointees as you like.

## 6.06 Terms of Bypass Trust

- Click **Next** to proceed to the “**Bypass Trusts**” introductory frame. Click **Next** again to proceed to the first of several “**Husband’s Will-Bypass Trust Terms**” frames.
  - Click **y** for Wife and click **y** again for children to be beneficiaries.
  - Click **n** to exclude Descendants as beneficiaries.
  - Click **p** to designate June as Primary Beneficiary.

15. Husband's Will-Bypass Trust Terms

Who are the main beneficiaries of the Bypass Trust?

Y  N  Wife

Y  N  Children

y  N  Descendants

What is the wife's relative status?

P  S  Primary or S  Secondary Beneficiary

- Click **Next** to proceed to the second “Husband’s Will-Bypass Trust Terms” frame. Select **The wife’s death** as the Bypass Trust’s termination date.

16. Husband's Will-Bypass Trust Terms

The Bypass Trust will terminate upon the last to occur of:

The wife's death

The youngest child's reaching age \_\_ [1]

The death of the last surviving child

- Click **Next** to proceed to the third “Husband’s Will-Bypass Trust Terms” frame. Select the **shall** distribution standard.

17. Husband's Will-Bypass Trust Terms

General distributions from the Bypass Trust:

"Shall" distribution standard

"May" distribution standard

- Click **Next** to proceed to the fourth “Husband’s Will-Bypass Trust Terms” frame. Select **No Optional Distributions**.

18. Husband's Will-Bypass Trust Terms

Optional distributions from the Bypass Trust:

NO Optional Distribution Provisions

Distributions to Guardians

Home & Business Distributions To Children

Who Are Over Age:

y  N  Are Home & Business Distributions Advancements?

- Click **Next** to proceed to the fifth “Husband’s Will-Bypass Trust Terms” frame. Click **y** to give June a testamentary power of appointment. Include as many permissible appointees as you like.

19. Husband's Will-Bypass Trust Terms

Y  N  Will the wife have a testamentary power of appointment over the Bypass Trust?

Pick one or more permissible donees

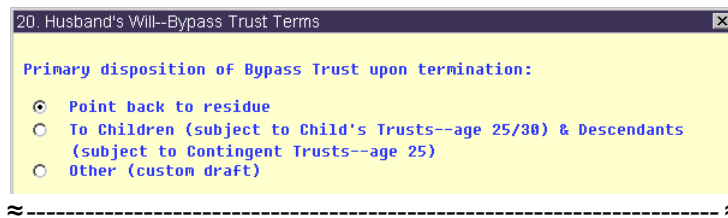
Max (any individual or entity)

Descendants

Spouses of Descendants

Charity

- Click **Next** to proceed to the sixth and final “Husband’s Will-Bypass Trust Terms” frame. Select **Point back to residue**.



20. Husband's Will--Bypass Trust Terms

Primary disposition of Bypass Trust upon termination:

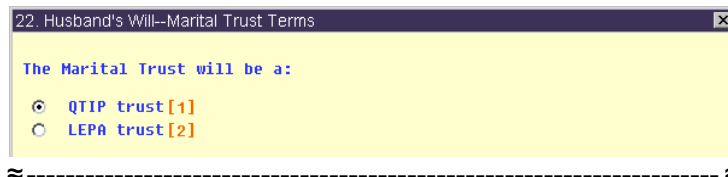
Point back to residue

To Children (subject to Child's Trusts--age 25/30) & Descendants (subject to Contingent Trusts--age 25)

Other (custom draft)

## 6.07 Terms of Marital Trust

- Click **Next** to proceed to the “Marital Trusts” introductory frame. Click **Next** again to proceed to the first of several “Husband’s Will-Marital Trust Terms” frames. Select **QTIP**.



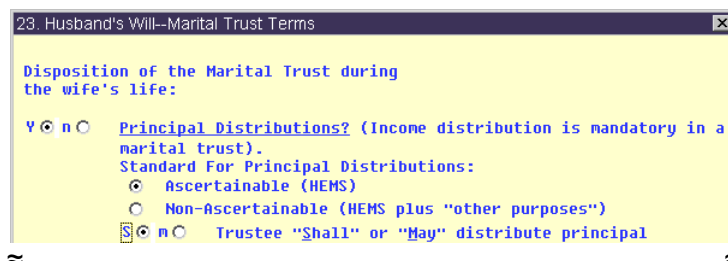
22. Husband's Will--Marital Trust Terms

The Marital Trust will be a:

QTIP trust[1]

LEPA trust[2]

- Click **Next** to proceed to the second “Husband’s Will-Marital Trust Terms” frames. Click **y** to allow principal distributions and select **Ascertainable (HEMS)** and **shall** for the Principal Distributions Standard.



23. Husband's Will--Marital Trust Terms

Disposition of the Marital Trust during the wife's life:

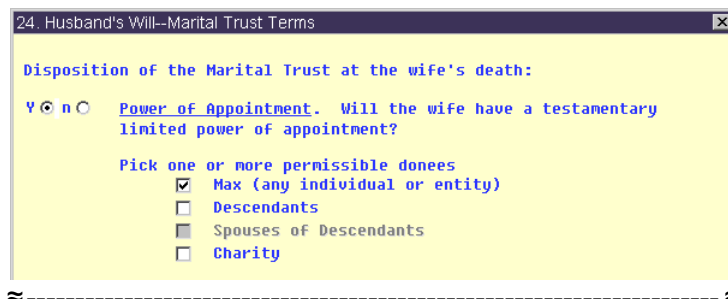
**Principal Distributions?** (Income distribution is mandatory in a marital trust).  
Standard For Principal Distributions:

Ascertainable (HEMS)

Non-Ascertainable (HEMS plus "other purposes")

Trustee "Shall" or "May" distribute principal

- Click **Next** to proceed to the third “Husband’s Will-Marital Trust Terms” frame. Click **y** to give June a testamentary power of appointment. Include as many permissible appointees as you like.



24. Husband's Will--Marital Trust Terms

Disposition of the Marital Trust at the wife's death:

**Power of Appointment.** Will the wife have a testamentary limited power of appointment?

Pick one or more permissible donees

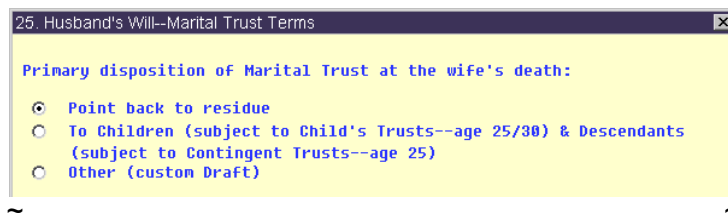
Max (any individual or entity)

Descendants

Spouses of Descendants

Charity

- Click **Next** to proceed to the fourth and final “Husband’s Will-Marital Trust Terms” frame. Select **Point back to residue**.



25. Husband's Will--Marital Trust Terms

Primary disposition of Marital Trust at the wife's death:

Point back to residue

To Children (subject to Child's Trusts--age 25/30) & Descendants (subject to Contingent Trusts--age 25)

Other (custom Draft)

## 6.08 Specific Gifts

- Click **Next** to proceed to the “**Specific Gifts**” introductory frame. Click **Next** again to proceed to the first “**Husband’s Will-Personal Effects**” frame.
  - Click **y** for Personal Effects gifts.
  - Click **y** for a Memo for personal effects.
  - Click **m** for a Mandatory memo.
  - Click **n** for no Specific Gifts.
  - Click **n** for no Advanced options.

27. Husband's Will--Personal Effects

**Personal Effects?** Will there be any personal effects disposition? (memo, specific items and/or general personal effects gift?)

**Memo.** Will there be a memorandum on personal effects?  
  **Mandatory** (handwritten codicil) or  
  **Precatory** (suggested division only)

**Specific Gifts.** Will there be any specific gifts?

**Advanced.** Do you want to customize personal effects wording preferences?

- Click **Next** to proceed to the second “**Husband’s Will-Personal Effects**” frame. Select **Wife, gift over to children and descendants.**

28. Husband's Will--Personal Effects

Disposition of [remaining] personal effects:

**NONE.** No disposition of personal effects

**Wife**

**Wife, gift over to children**

**Wife, gift over to children and descendants**

**Children**

**Children and descendants**

**Named individual**

- Click **Next** to proceed to the “**Husband’s Will-Cash Gifts**” frame. Click **n** for no Cash Gifts.

29. Husband's Will--Cash Gifts

**Cash Gifts.** Will there be any cash gifts?

- Click **Next** to proceed to the “**Husband’s Will-Misc. Personality**” frame.
  - Click **y** for a gift of Wife’s Retirement Accounts.
  - Click **n** for no S-Corp. Stock gift.

30. Husband's Will--Misc. Personality

**Wife's Retirement Accounts?** Will there be a specific gift to the wife of any interest in her retirement accounts?

**S-Corp. Stock?** Will there be a specific gift to the wife of any interest in S-corporation stock?

- Click **Next** to proceed to the “**Husband’s Will-Real Estate**” frame. Click **n** for no Personal Residence(s) gift.

31. Husband's Will-Real Estate

**Personal Residence(s)?** Will there be a gift of the Personal Residence(s) to the wife?

## 6.09 Tax Planning Gifts

- Click **Next** to proceed to the “**Tax Planning Gifts**” introductory frame. Click **Next** again to proceed to the “**Husband’s Will-Details of Marital Lead Gift**” frame.
  - Select **Marital Trust** as the Recipient of Marital Amount Gift
  - Click **y** to include IRD.
  - Select **True Worth** Valuation of In Kind Distributions.

33. Husband's Will-Details of Marital Lead Gift

**Recipient of Marital Amount Gift:**

Wife outright

**Marital Trust**

Other (Custom Draft)

**IRD Included?** Will all income in respect of a decedent be specifically allocated to the marital gift?

**Valuation of In Kind Distributions:**

Fairly Representative

**True Worth**

Minimum Worth

Lesser of

- Click **Next** to proceed to the “**Husband’s Will-Disclaimer by Wife**” frame.
  - Click **y** to provide for June’s disclaimer.
  - Select **Family Trust: To Bypass Trust** as the recipient of the disclaimed portion of the marital deduction gift.

34. Husband's Will-Disclaimer By Wife

**Do you wish to provide for the wife's disclaimer of the Marital Deduction Amount?**

**Disposition of Marital Deduction Amount if wife survives but disclaims:**

**Family Trust: To Bypass Trust**

To Children (subject to Child's Trusts--age 25/30) & Descendants (subject to Contingent Trusts--age 25)

Other (custom draft)

## 6.10 Remaining Property

- Click **Next** to proceed to the “**Remaining Property**” introductory frame. Click **Next** again to proceed to the first “**Husband’s Will-Remaining Property Disposition**” frame.
  - Click **y** to indicate that June’s survival is relevant.
  - Select **Bypass Trust** to receive the Remaining Property if June survives.

36. Husband's Will--Remaining Property if Wife Survives

Does wife's survival affect the Remaining Property disposition?

Recipient of Remaining Property if wife survives:

- Wife outright [1]
- Marital Trust [2]
- Bypass Trust
- Children (subject to Child's Trusts--age 25/30) & Descendants (subject to Contingent Trusts--age 25)
- Other (custom draft)

- Click **Next** to proceed to the second “Husband’s Will- Remaining Property Disposition” frame. Select **To Children . . .** to receive the Remaining Property if June does not survive. (Note how *FlexDraft* incorporated the terms you previously specified for the Child’s and Contingent Trusts.)

37. Husband's Will--Remaining Property-Disposition

Disposition of Remaining Property if wife does not survive but descendants survive:

- To Children (subject to Child's Trusts--age 25/30) & Descendants (subject to Contingent Trusts--age 25)
- Other (Custom Draft)

- Click **Next** to proceed to the “Husband’s Will- Remaining Prop-Contingent Disp” frame. Select **To Husband’s and Wife’s Heirs (1/2 each)** as “Contingent Beneficiaries.”


38. Husband's Will--Remaining Prop-Contingent Disp

Contingent Disposition of Remaining Property:

- To Husband's Heirs
- To Husband's and Wife's Heirs (1/2 to each)
- To Charity

## 6.11 Fiduciary Provisions

You’ve finished the dispositive provisions. Now you’re ready for the boilerplate.

- Before continuing, save your work:** Click the Save button on the button bar. 
- Click **Next** to proceed to the “Fiduciary Provisions” introductory frame. Click **Next** again to proceed to the “Husband’s Will-Guardian Appointment” frame. Click **n** to indicate that you will not name guardians via the Will.

40. Husband's Will--Guardian Appointment

Appointment of guardians in Husband's Will

Will the husband's Will name guardians for his children?[1]

- Click **Next** to proceed to the “Husband’s Will-Executor Appointment/Succession” frame. Select **sole** Executor appointment.

41. Husband's Will-Executor Appointment/Succession

Type of Executor Appointment/Succession (pick one option):

Sole Executor [with 1 or more successors]

Co-Executors [with 1 or more successors]

Sole Executor succeeded by Co-Executors

- Click **Next** to proceed to the “**Husband’s Will-Sole Executors**” frame.
  - Indicate that **4** sole executors will be named.
  - Right-click on each of the fields and double-click from the lookup list to name the following executors: **June, Wally, the Beaver,** and **Big Trust Company**.

42. Husband's Will-Sole Executors

How many sole executors will be named:

	Name	Gender
1st:	June A. Cleaver	F
2nd:	Wallace Cleaver	M
3rd:	Theodore Cleaver	M
4th:	Big Trust Company	C

- Click **Next** to proceed to the first “**Husband’s Will-Trustee Appointment/Succession**” frame. Click **y** to “**Mirror**” Ward’s Trustee appointments to his Executor appointments.

43. Husband's Will-Trustee Appointment/Succession

Mirror ▶ husband's Will Trustee appointments to husband's Will Executor appointments.[1]

**Note:** When you select the Mirror option, *FlexDraft* automatically fills in Trustee appointments that mirror the Executor appointments. *FlexDraft* does not link the Trustee appointments to the Executor appointments; thus:

- Subsequent (post mirroring) revisions to Ward’s Executor Appointments will not automatically be reflected in his Trustee appointments.
  - Subsequent (post mirroring) revisions to Ward’s Trustee Appointments can be made freely and without affecting Ward’s Executor appointments.
  - You can repeat the mirror process as often as you like.
- Click **Next** to proceed to the second “**Husband’s Will-Trustee Appointment/ Succession**” frame. Note that “Sole Trustee” has already been selected for the type of Trustee appointment.
  - Click **Next** to proceed to the “**Husband’s Will-Sole Trustees**” frame. Note that June, Wally, the Beaver, and Big Trust Company are already named as Ward’s 4 Trustees.
  - Click **Next** to proceed to the “**Husband’s Will-Trustee Appointment Provisions**” frame.
    - Click **n** to *not* authorize June to appoint a co-trustee.
    - Click **n** to *not* allow children to be trustee of their own trust.
    - Select **Trustee Appointer** as the method for appointing successor trustees.

46. Husband's Will-Trustee Appointment Provisions

y  N Will the wife have the power to appoint a co-trustee to serve with her?

y  N Will each child have the power to become trustee of his or her own trust?[1]

How will additional successor trustees be appointed?

Trustee Appointer [2]

No Provision

- Click **Next** to proceed to the “**Husband’s Will-Trustee Appointers**” frame. Indicate that **3** Trustee Appointers will be named.
  - Right-click on the first Name/Class field and double-click **Name** from the lookup list.
  - Right-click on the first Name or Class Description field and double-click **June Cleaver** from the lookup list as the first Trustee Appointer.
  - This time, Tab to the second Name/Class field and just type the letter “**c**”, then Tab to the next field. (This is faster than using the lookup list.)
  - Right-click on the second Name or Class Description field and double-click **Named bene (all)** from the lookup list as the second Trustee Appointer.
  - Tab to the third Name/Class field, type the letter “**c**” again.
  - Right-click on the third Name or Class Description field and double-click **Oldest descendant** from the lookup list as the third Trustee Appointer.

47. Husband's Will-Trustee Appointers

How many successive Trustee Appointers, [1] either by name or by class, will be designated?

	Name/ Class	Name or Class Description
1	N	June A. Cleaver
2	C	Named bene (all)
3	C	Oldest descendant

- Click **Next** to proceed to the “**Husband’s Will-Trustee Removal**” frame. Click **n** to not include trustee removal powers.

48. Husband's Will-Trustee Removal

y  N Will the husband's Will include trustee removal powers?

- Click **Next** to proceed to the “**Husband’s Will-Qualified Individual Age**” frame. Click to select **Contingent Trust vesting age**.

49. Husband's Will-Qualified Individual Age

Qualified Individual minimum age: [1]

Child's Trust last vesting age (currently 30)

Contingent Trust vesting age (currently 25)

Age:

- Click **Next** to proceed to the “**Husband’s Will-Fiduciary Compensation**” frame. Click **y** for all 3 provisions.



- Click **N**ext to proceed to the “Husband’s Will-Fiduciary Exoneration” frame.
  - Click **b** for broad fiduciary exoneration.
  - Click **y** for additional exoneration for uncompensated individual fiduciaries.

- Click **N**ext to proceed to the “Husband’s Will-Misc. Fiduciary Provisions” frame. Select “**Wall**” version . . . to use the least restrictive “Upjohn” restrictions, and click **f** to put fiduciary appointments at the front of the Will.

- Click **N**ext to proceed to the “Husband’s Will-Fiduciary Provisions-Manual Over-Ride Options” frame. Click **n** to not assume that trustee removal powers are created; click **y** for all other options.

## 6.12 Administrative Provisions

- Click **N**ext to proceed to the “Administrative Provisions” introductory frame. Click **N**ext again to proceed to the “Husband’s Will-Miscellaneous Administrative Provisions” frame.
  - Click **y** to activate provisions for UPIA (the “Uniform Prudent Investor Act”).  
*Note:* The only time you might ever want to chose to *not* activate UPIA

provisions if you're finishing up an older document that needs to be consistent with other pre-UPIA documents, but even that is not advisable (because any document drafted after the effective date of UPIA will be construed differently from one drafted prior to the UPIA effective date).

- Click **s** for short form boilerplate.
- Click **b** for broad investment authority.
- Click **y** to require Fiduciary Reports only when demanded.
- Click **n** to not authorize change of situs.

55. Husband's Will-Miscellaneous Administrative Provisions

**n**  **o** Activate UPIA provisions[1]

**l**  **s**  **o** Long or Short boilerplate provisions

**b**  **n**  **o** Broad or Narrow investment authority

**y**  **n**  **o** Fiduciary Reports are required only when beneficiary demands[2]

**y**  **n**  **o** Change of trust situs is authorized[3]

- Click **Next** to proceed to the “Husband’s Will-Debts, Expenses & Taxes” frame.
  - Click **y** to give the Executor discretion (but not duty) to charge “management expenses” to marital or charitable share.
  - Click **n** to not include the special use property clause.

56. Husband's Will-Debts, Expenses & Taxes

Optionally, select any one or more (or none) of the following:

**d**  **n**  **o** Discretionary or Mandatory charging of "Management Expenses" to marital or charitable share[1]

**y**  **n**  **o** Special Use Property (if beneficiary refuses to cooperate with special use election, charge increased tax to him).

- Click **Next** to proceed to the “Husband’s Will-No Contest Clause” frame. Click **n** to not include a no contest clause.

57. Husband's Will-No Contest Clause


**y**  **n**  **o** Will Husband's Will contain a No Contest Clause?

- Click **Next** to proceed to the “Husband’s Will-Signing Details” frame.
  - Click **y** to indicate that the signing will take place in your office.
  - Specify **2** witnesses.
  - Specify **18** as the minimum age for witnesses.
  - Click **n** to indicate that Ward will not initial every page.
  - Click **n** to indicate you will not use a “1-Step” execution.

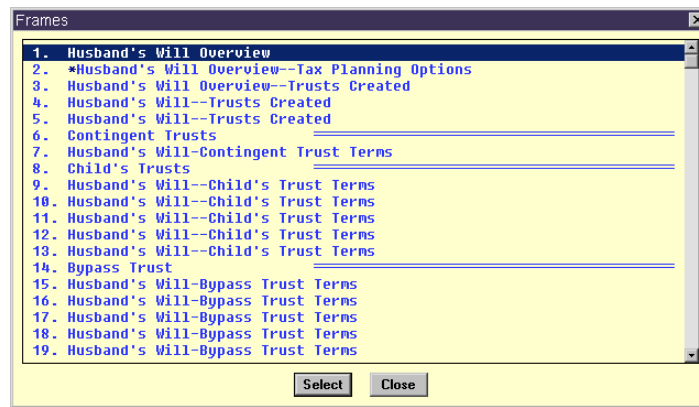
- When you finish Ward’s signing details, click **Next**; you’ll come to the “Client Specific/OverRide-Format” frame & the “Client Specific/OverRide-Drafting Pref’s” frame; these are the same frame you saw at the end of the Ancillary documents dialogue. Click **n** to *not* review or modify your formatting or drafting options for the Cleavers’ documents.
- Click **Next** and you’ll come to the “Save Answers” frame. Click **y** to save your work so far.
- Click **Next** and you’ll come to the “End of Document Interview” frame.

**Note:** Be sure it indicates zero (“0”) unanswered frames.

If it does not indicate zero unanswered frames, here is another way to deal with that problem:

- While still viewing the “End of Document Interview” frame, click the “Go to Frame” button on the button bar and the **Go To Frame** window will appear. 

- Click the **List Frames** button and a list of all frames in the dialogue you just completed will appear.  
**Each unanswered frame will be preceded by an asterisk “\*”.** (In the following list, the second frame is unanswered.)



- Double-click the first unanswered frame and complete the unanswered questions until the Unanswered message disappears from the Status Bar.
- Click the Next Unanswered button on the button bar to proceed to the next unanswered frame and repeat the process until you reach the end of the dialogue with “0 unanswered frames.”

## 6.13 Finish Up

- Now, at the “[End of Document Interview](#)” frame, click [Next](#). FlexDraft will assemble Ward’s Will. The next thing you see depends on whether you chose *Send to Screen* or *Send to Word Proc* back at the “[Assemble Options](#)” dialogue box. (See part 5.08, “Documents” at page 20 of this tutorial.) In any event, you should eventually be viewing Ward’s Will in your word processor.
- **If you are using WordPerfect**, always remember to “Generate” Wills and trusts before printing, as noted in the Getting Started manual.
- **If you are using Microsoft Word**, the first thing to do is to “apply the numbering Scheme” (the one that you imported as per the getting started manual) to Ward’s Will.
  - **If you haven’t imported a numbering Scheme yet**, you should notice some quirks in the formatting of paragraph numbers and headings. (The *text* of Article and Section headings may be boldfaced and/or underlined – whatever you specified in Setup – but the heading *numbers* are probably normal text; also, tabs, indents and actual number formats may be, in a word, goofy.)

In this case, it’s time to take a detour to import a “numbering Scheme”: You’ll find quick step by step instructions in the Resource Folder; refer to either—

- “[How to Import Schemes-Word XP.pdf](#)” – if you use Word XP or Word 2003, or
- “[How to Import Schemes-Word 2010.pdf](#)” if you use Word Vista or Word 2010.

FlexDraft documents are not going to format properly in Word until you import a numbering Scheme. (For a more details refer to the getting started manual’s discussion titled “*Microsoft Word and FlexDraft*”.)

- **If you have imported a numbering Scheme**, you should “apply” the numbering scheme to Ward’s Will.

**In Word XP & Word 2003 this takes 4 mouse clicks:**

1. Right-click the “1.” in the *first* Article heading.
2. Left-click [Bullets and Numbering ...](#) on the pull down menu. The [Bullets and Numbering](#) dialog box will open.
3. Left-click the numbering Scheme you imported.
4. Left-click **OK**.

(For more detailed instructions *with screen shots*, see *How to Import Schemes-Word XP.pdf*, in the Resource folder.)

**In Word 2007 & Word 2010 this takes 3 mouse clicks:**

1. Left-click the “1.” in the *first* Article heading to highlight it.
2. left-click the [Multi-level Lists](#) button to open the [Multi-level Lists](#) pane.
3. Left-click the numbering Scheme (which will be in the [List Library](#) part of the pane).

(For more detailed instructions *with screen shots*, see *How to Import Schemes-Word 2010.pdf*, in the Resource folder.)

In either case, the instant after the final mouse-click, Word will automatically reformat the numbering throughout the entire document to match the imported numbering Scheme.

## 7. “Quick Clone” a Will for June

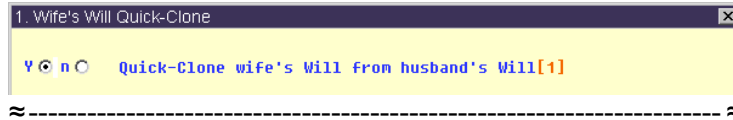
You can draft a Will for June in exactly the same way that you drafted Ward’s Will. Her Will can be as similar – or as different – as you desire. However, if June’s Will is going to be an absolutely identical mirror image of Ward’s Will, you can Quick Clone her Will from Ward’s in just a few seconds.

### 7.01 Preliminaries

- Start *FlexDraft*.
- Be sure the *FlexDraft* System is “open.”
- Be sure the Answer file for the Cleavers is open. (“[\[Clever, Ward & June\]](#)” will be displayed in the CAPS User Title Bar.)
- Get to the [FlexDraft Main menu](#) and double-click [Select Documents to Draft](#), check the box for a Will for Wife, then click [Next](#) to return to the main menu.
- Back at the Main menu, double-click [Draft Selected Documents](#), then double-click [Wife’s Will](#) in the menu that pops up. The “[Assemble Options](#)” dialogue box will appear. Complete your Assemble Options and left-click [OK](#).

## 7.02 The Quick Clone Process

- When you finish setting your Assemble Options and click , you'll proceed to the "Wife's Will Quick Clone" frame.
- Click **y** to Quick Clone June's Will from Ward's Will.



- Click  and, immediately, you'll be at the "End of Document Interview" frame.
- click  again and FlexDraft will assemble June's Will.

## 7.03 Understanding Quick Cloning

When you Quick-Clone June's Will from Ward's Will, FlexDraft doesn't really draft a Will for June. Instead, FlexDraft *redrafts Ward's Will, substituting June's personal information for Ward's personal information (name, gender, children, etc.)*.

When you "really" draft June's Will, you create a set of Answers for June that parallel the Answers you created when you drafted Ward's Will. In this case, Ward's Will and June's Will each exist independently and can each be revise independently.

By contrast, if you Quick Clone June's Will from Ward's, no separate Answers are created for June and you can't ever directly revise *any* aspect of June's Will because *every* aspect of her Will exists only derivatively of Ward's Will. Likewise, any changes you make to Ward's Will will be reflected in any subsequent Quick Clone of June's Will.

The Quick Clone feature is a big time saver whenever you're certain that, so far as FlexDraft is concerned, the husband and wife will have identical Wills (i.e., where their Wills are going to be identical mirrors *or* all differences between their Wills will be the result of custom drafting outside of FlexDraft).

The Quick Clone feature is not a time saver whenever the husband and wife will not have identical Wills, so far as FlexDraft is concerned; e.g., where he creates a marital trust but she does not, or where he does not do second generation planning but she does. In circumstances such as these, Quick Cloning is counterproductive; you're better off drafting the wife's Will directly.

[END OF TUTORIAL]