



THE SAME PAGE® Screen Shots

Your Client Database -

The screenshot shows the 'Same Page - [Clients]' application window. It features a menu bar with 'File' and 'Help'. A logo for 'The Same Page' is in the top right. Below the logo is a table titled 'Clients' with the following data:

	Full Name	Home Phone	Office Phone	Email Address	Last Modified
▶	Ann Smith	(345)678-9999	(123)456-7891	smith33ff@hallworth.com	
	Chris Musgrave				10/11/2007 9:39 AM
	Jim Beam				10/11/2007 4:17 PM
	John Maimone				10/11/2007 9:52 AM
	Kathy Jones		(609) 555-1212	kjones@yahoo.com	
	Mike Maimone				10/11/2007 9:40 AM
	Steven A Smith		6098060238	smith@albridge.com	

At the bottom of the window, there are three buttons: 'Add Client', 'Edit Client', and 'Cancel'. A red watermark 'SAMPLE: FOR DEMO USE ONLY' is overlaid on the bottom left.

Client Information Screen (Tab 1: Personal Data) -

The screenshot shows the 'Same Page - [Clients]' application window with the 'Personal Data' tab selected. The 'Client Name' dropdown is set to 'Ann Smith'. Below the logo is a navigation bar with tabs: 'Personal Data', 'CheckList', 'Contact List', 'Accounts & Assets', 'Estate Planning Documents', 'LastWord Forms', and 'Data Key'. The 'Personal Data' tab contains several form sections:

- Client:** Full Name, Address, State (dropdown), Phone Number Home, Office, Email Address, Driver's License (State dropdown, Number).
- Spouse / Partner:** Name, Address, State (dropdown), City, Zip, Phone Number Home, Office, Email Address.
- Emergency Contact | Other than Spouse / Partner:** Name, Relationship, Phone Number Home, Office, Email Address.
- Children:** Name, BirthDate (dropdown), Address, City, State (dropdown), Zip, Phone Number Home, Office, Email Address.

Buttons for 'Copy Client Contact Info', 'Add Child', and 'Edit Child' are present. At the bottom, there are 'Save' and 'Cancel' buttons. A red watermark 'SAMPLE: FOR DEMO USE ONLY' is overlaid on the bottom right.


Client Information Screen (Tab 4: Accounts & Assets) -

Client Name:

Personal Data | **CheckList** | Contact List | Accounts & Assets | Estate Planning Documents | LastWord Forms | Data Key

Add Another Item
 Item Type:

Type	Owner	Company or Location	Account Number
▶ Annuity	Retirement Plans		
Bank Account			
Bank Account			
Investment			
Investment			
Investment			
Business Interest			
Real Estate Type (Vacation Home)			
Real Estate Type (Rental Property)			
Employer Income			
Civil Service Income			
Pension Income			



Retirement Plan Inventory Worksheet

Policy Owner:

Account Location: *

Account Number:

Type of Retirement Plan:

Contact & Phone Number:

WebSite Address:

Current Date:

Current Balance:

Primary Beneficiary:

Contingent Beneficiary:

Notes:

SAMPLE: FOR DEMO USE ONLY

Client Information Screen (Tab 5: Estate Planning Documents) -

Client Name:

Personal Data | CheckList | Contact List | Accounts & Assets | **Estate Planning Documents** | LastWord Forms | Data Key

Type	DateDocumentLastAmendment	Notes
▶ WILL	10/24/2007 3:02 PM	
WILL	10/24/2007 3:02 PM	
TRUST	10/24/2007 3:02 PM	
DURABLE POWER OF ATTORNEY	10/24/2007 3:02 PM	
HEALTHCARE POWER OF ATTORNEY / PROXY	10/24/2007 3:02 PM	

Estate Planning Documents

Type:

Date of Document's last Amendment:

Trustee:

Witnessed by:

Who has copies?:

Document is For:

Original Document is Located:

Attorney's office where it was drafted:

Who is designated the POA?:

Who is given Authority?:

What happens to the Ownership?:

Notes:

SAMPLE: FOR DEMO USE ONLY

Client Information Screen (Tab 7: DataKey Emergency Information) -

DataKey Request Form
Please add the following public information, which can be viewed by anyone accessing the DataKey. Use additional sheets if necessary. Copy Client Contact Info

Name: Address:

City: State:

Zip: Phone Number:

Emergency Contact Name: Emergency Contact Phone:

Primary care Physician: Primary care Physician Phone:

Allergies: Prescribed Medications:

Copies of Living Will & Health care power of Attorney: Additional Information:

SAMPLE: FOR DEMO USE ONLY

DataKey File Transfer Screen -

Client Name:

Personal Data | CheckList | Contact List | Accounts & Assets | Estate Planning Documents | LastWord Forms | Data Key

Data Key
File Path:

File Names

File Path
C:\Documents and Settings\Mike Maimone.CONCORDADVISORS\My Documents\Same P
C:\Documents and Settings\Mike Maimone.CONCORDADVISORS\My Documents\Same P
C:\Documents and Settings\Mike Maimone.CONCORDADVISORS\My Documents\Same P

SAMPLE: FOR DEMO USE ONLY

Print Documents (Blank Worksheets, or Completed Documents for Portfolio) -


Same Page

File | Help
Clients
Manage Users
Change Password
Print
Import
Advisor Info
Exit

Print

- Blank Document
- Documents

PrintReports



Client Name:

Data / Document gathering Checklist

Data / Document Gathering Checklist Advisor Info

Last Word Forms

Universal Beneficiary Designation Form Beneficiary Report
 Statement Of Clarity Datakey Request Form

Worksheets

Personal Data Worksheet Annuity Inventory Worksheet
 Bank Account Inventory Worksheet Business Interest Inventory Worksheet
 Estate Planning Documents Worksheet Income Inventory Worksheet
 Personal Property Inventory Worksheet Retirement Plan Inventory Worksheet
 Medical Insurance Worksheet Property / Auto Insurance Worksheet
 Life Insurance Worksheet Investment Inventory Worksheet
 Liabilities Inventory Worksheet Real Estate Inventory Worksheet
 Safe Deposit Box Inventory Worksheet

SAMPLE: FOR DEMO USE ONLY