

Contact Form - Add

File Edit View Process Help

Save & Close Save Delete Cancel

Primary Secondary Additional Custom Related Notes Docs Phone E-Mail Mail Web Billing Timeline

Full Name: [] Code: EPIESTATE PLAN
 Last: [] First: [] Staff: MJM|MERWYN J MILLER
 Scl: [] Home: [] Fax: [] Work: []
 Mat Ref: [] Notify: Trigger: Private: Status: []

2 Source: [] 3 Source: []
 FIRM: [] Page/Cell: []
 Address: [] Estate Size: 00
 City/Zip: [] NweLtrResp: []
 Brk Date: [] Group: []
 4 E-Mail: [] 5 LSTF/ULTF: []
 WWW: [] NickName: []
 Fax Nwslt: NweLtr: []
 6 Memo: [] EnterDate: []

Contacts - Primary

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 Scl: [] Home: [] Fax: [] Work: []
 Mat Ref: [] Notify: Trigger: Private: Status: []

7 #Chid: [] 8 CPA: []
 Ages: [] -im: []
 SenCL: 000 00 0000 Address: []
 SenCL2: 000-00-0000
 Fst_T123: [] City/Zip: []
 Chcr Gif: Tel: []
 9 Cell #: [] 10 User10: []
 Pgr #: [] User11: []
 User7: [] User12: []
 User8: [] User13: []
 User9: [] User14: []
 User12: [] User18: []

Contacts - Secondary

Matter Form - Add

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Mat Ref: [] Code: ESTATE PLANIN

Matter No: [] Box#: [] Staff: []

N/W: [] Rev Date: []

Client: [] Notify Trigger Private Status: []

QDuT SuPwAppl
 QSST Sor5
 SpclVds C/P Date: []
 Bere: [] Cris Date: []
 Ord# 23: [] [] [] DPA: [] [] []
 Pct Trust: [] Deed Typ: []
 W/D 1: [] Corp Fic: []
 W/D 2: [] # Kids: []
 W/D 3: [] Ages: []
 HCP Date: [] Box Dt: []
 Revld: [] Destroy Ltr: []
 GST Pu Destroyed: []

Matters - Secondary

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Mat Ref: [] Code: ESTATE PLANIN

Matter No: [] Box#: [] Staff: []

N/W: [] Rev Date: []

Client: [] Notify Trigger Private Status: []

2
 CllstName: []
 LstName: []
 Firm: []
 Address: []
 City/Zip: [] [] []
 MS/Title: [] []
 1
 Will Typ: []
 Date: []
 Cod #: []
 6 Memc: []

3
 Rev Tr: []
 Date: []
 Arr #: []
 Date: []
 Top/Exec: [] [] []
 MFCCode: [] []
 5
 NickName: []
 Cod Date: []
 Qtip:

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11
 User19 [] User20 [] User21 [] User22 [] User23 [] User24 []
 12
 User25 [] User26 [] User27 [] User28 [] User29 [] User30 []
 13
 User31 [] User32 [] User33 [] User34 [] User35 [] User36 []
 14
 User37 [] User38 [] User39 [] User40 [] User41 [] User42 []

Contacts - Additional

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Mat Ref: [] Code: ESTATE
 Matter No: [] Box#: [] Staff: []
 Home#: [] Work#: []
 Client: [] Notify: [] Trigger: [] Private: [] Status: []

2
 Client Name: []
 Last Name: []
 Firm: []
 Address: []
 City/Zip: []
 MS/Title: []
 3
 Death Date: []
 Trust: []
 Trust Dt: []
 Amend: []
 City/Zip: []
 Tel: []
 4
 Will Date: []
 Occid: []
 Acco#: []
 5
 NickName: []
 User5: []
 User6: []

6
 Memo: []

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Matter No [] Bcx# [] Staff []

Furner# [] Work# []

Client [] Notify Trigger Private Status []

7 CPA [] Judge []

Firm [] Assistant []

Address [] Address []

City/Zip [] City/Zip []

Tel [] Tel []

User [] User10 []

User [] User11 []

User [] User12 []

User [] User13 []

User [] Destroy1 []

User12 [] Destroyec []

Matters - Secondary

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Mat Ref [] Code ESTATE PLANN

Matter No [] Bcx# [] Staff []

N/W [] Rev Date []

Client [] Notify Trigger Private Status []

11 Mngr #1 [] Mngr #2 []

Mng 11st [] Mng121ST []

Mngr#1Title [] Mngr2Title []

Address [] Mngr2Add []

Mngr1City [] Mngr2City []

Mail Lct [] Mail Lct []

12 [] Loc Desc []

Ls:F/ULtr [] Gift Trac

Est Typ 1 [] Ch Gift

Est Typ 2 [] UC User []

Est Typ 3 [] User35 []

Enter Date [] User36 []

Matters - Additional