

Advisor Portal Screenshots and Annotations

Clients

129 Total Clients | 5 Not Invited | 68 Invited | 56 Active

Search [] Filter (0) + Add Teammate + Add Client

Client	Spouse/Partner	Teams	Last Login	Document Creation	Client Status
TJ Thomas Jones	Teresa King	Lauren Klein D...	July 09, 2024	Ready to Sign	Active
TN Tyler Needler	Taylor Needler	Lauren Klein D...	June 14, 2024	Ready to Sign	Active
LW Lynne Wiggins	Susan Binford	Lauren Klein D...	June 10, 2024	Ready to Sign	Active
PK Peter Kaplan	Sharla Kaplan	Lauren Klein D...	April 12, 2024	Ready to Sign	Active
LR Lisa Rosenthal	Shane Rosenthal	Lauren Klein D...	June 21, 2024	Ready to Sign	Active
BJ Brooke	Sean Jackson	Lauren Klein D...	July 11, 2024	Ready to Sign	Active

This is the main Advisor Dashboard.

Activity Filter (0) Hide

Today

DL Daniel Lohrfink completed their Individual Revocable Trust. It is ready to be validated. 10:33

Wealth Insight

Consider speaking with your client about next steps to make their estate plan legally valid. Your client can request a hard copy printed and shipped to them, which has validation instructions custom to their documents and state.

Add Note Save

8/27/2024

JE Joseph Edmonds deleted a Cash Test asset/liability. August 28, 2024, 18:21

JE Joseph Edmonds added a Cash Test asset/liability. The current estimated value is \$12,000,000. August 28, 2024, 18:16

RC Reinaldo Carvalho added a Oleander Dr Mortgage - First Citizens asset/liability. The current estimated value is \$-275,608. August 28, 2024, 14:35

RC Reinaldo Carvalho added Bela Juj Revocable Trust as owner of their Rei & Syl

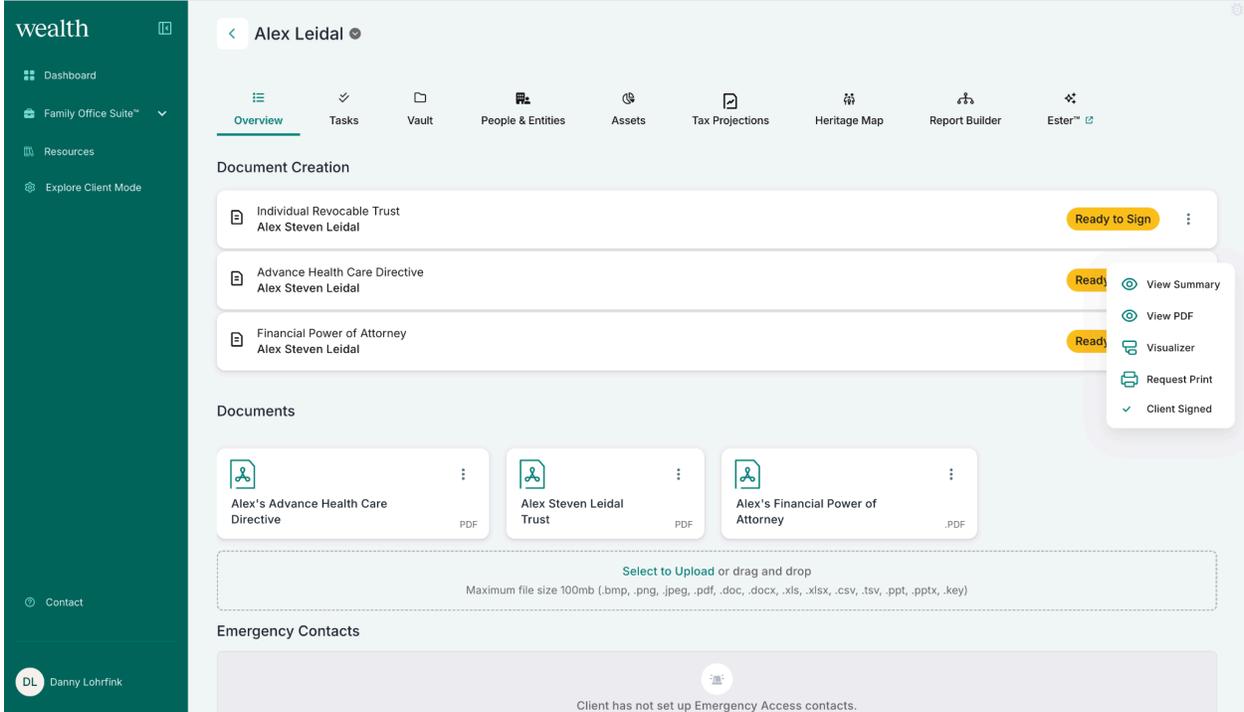
Clients

101 Total Clients | 32 Not Invited | 2 Invited | 67 Active

Search [] Filter (0) + Add Teammate + Add Client

Client	Spouse/Partner	Teams	Last Login	Document Creation	Client Status
AW Adeline White	-	Team 0123	-	-	Not Invited
AL Alex Leidal	-	Lohrfink_White	March 26, 2024	Ready to Sign	Active
AS Amy Shields	Craig Shields	Lohrfink_White	-	Drafting in Progress	Active
AW Anton Walter	Lea Walker	Lohrfink_White	October 17, 2023	Not Started	Active
AP Ari Preflite	-	Lohrfink_White	-	-	Not Invited
AJ Arthur James	Michelle James	Team 0123	-	-	Not Invited
Austin Brown	-	-	June	Not	Active

Advisors receive an activity log to monitor client actions and proactively engage in legacy planning conversations. This log is one-directional; advisors cannot “message” clients from here.



Advisors can drill into each client and perform several actions, including viewing client estate planning progress and details.

Kimberly Griffin Invite Client

Overview Tasks **Vault** People & Entities Assets Tax Projections Heritage Map Report Builder Ester™

Vault

Select to Upload or drag and drop
Maximum file size 100mb (.bmp, .png, .jpeg, .pdf, .doc, .docx, .xls, .xlsx, .csv, .tsv, .ppt, .pptx, .key)

Shared Files
Files that have been shared between you and your client.

Search Filter (2) MM/DD/YYYY to MM/DD/YYYY Category: All + Upload File

File Name	Date Uploaded	Last Modified	Shared With	Actions
BalanceSheet for Wealth.csv Investments	June 24, 2024	June 24, 2024	KG LK DL	⋮
Eric Griffin - Durable POA.pdf Financial Power of Attorney	June 24, 2024	June 24, 2024	KG LK DL	⋮
Eric Griffin - Medical POA.pdf Advance Health Care Directive ("Living Will")	June 25, 2024	June 25, 2024	KG LK DL	⋮
Eric Griffin - Will.pdf Wills & Supporting Documents	June 25, 2024	June 25, 2024	KG LK DL	⋮
Griffin 2015 Irrevocable Trust.pdf Irrevocable Trusts	June 25, 2024	June 25, 2024	KG LK DL	⋮

< 1 2 3 >

Advisors can view any documents clients create through wealth.com and any ancillary documents that clients upload, such as tax forms.

Heritage Map MG Meredith Grey

Meredith Derek

Familial Relationships Of:

- MG Meredith Grey

Spouse / Partner + Add

- DS Derek Shepherd Spouse

Parents

- EG Ellis Grey Parent
- TG Thatcher Grey Parent

Siblings + Add

- LG Lexie Grey Sibling
- MS Mark Sloan Sibling-in-law

Heritage Map

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graph TD
    EG[Parent Ellis Grey] --- MG[Client Meredith Grey]
    TG[Parent Thatcher Grey] --- MG
    MG --- DS[Spouse Derek Shepherd]
    MG --- ZS[Child Zola Shepherd]
    MG --- DSJ[Child Derek Shepherd Jr.]
    MG --- ES[Child Ellis Shepherd]
    MG --- MP[Sibling Maggie Pierce]
    MG --- LG[Sibling Lexie Grey]
    MG --- WND[Sibling-in-Law Dr. Winston Ndugu]
    MG --- MS[Sibling-in-Law Mark Sloan]
    DS --- AS[Sibling Amelia Shepherd]
    DS --- OH[Sibling-in-Law Owen Hunt]
  
```

Advisors can create “Family Trees” to map the relationships between multi-generational families. This is important in reaching the Next Generation.

The screenshot displays the 'Report Builder' interface on the wealth.com platform. At the top, the user 'Meredith Grey' is identified. The main report preview shows the title 'Estate Report August 2024' and the client name 'Meredith Grey & Dereck Shepherd'. The sidebar on the left lists 'Available Reports' with checkboxes for 'Estimated Estate Overview', 'Estate Structure', 'Asset Ownership Overview', 'Asset Ownership Breakdown', 'The Shepherd Family Living Trust (Joint)', 'Meredith Grey Support Trust (SLAT)', 'Shepherd Family Maintenance Trust (SLAT)', 'Shepherd Family Irrevocable Trust (ILIT)', 'The Dereck Shepherd Growth Trust (GRAT)', and 'EstateFlow™'. Below this, a 'Not Yet Completed' section lists 'Taxable Estate Analysis'. At the bottom of the sidebar, there are buttons for 'Download PDF', 'Download PowerPoint', and 'Generate Report'. The main report preview area shows a 'TABLE OF CONTENTS' with the first item being '1. Taxable Estate Overview'.

Visual Reports can be produced through the Advisor Portal. It is a streamlined and standardized way of creating beautiful estate flowchart summaries without laboring for hours in Excel and PowerPoint.

Report Builder Disclosures: *This report is intended to be used only for purposes of illustration. This report is not, and is not intended to be, legal advice. Any examples particular to your situation were generated using information that were provided to wealth.com. That information may not be accurate, complete or comprehensive.*

We allow our partner firms to customize these disclosures. Broker-dealers may decide to have the custom language standardized at the B/D level or enable DBAs to customize downstream. It is flexible to our partner’s needs.

Upload Extract Verify Create Trust Card Finish

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OFFICIAL RECORDS
INSTRUMENT # 1998103240 15 PGS
RECORDED IN OFFICIAL RECORDS
INSTRUMENT # 1998103240 15 PGS

VENICE, FLORIDA 34286

1998 AUG 04 10:25 AM
KAREN E. RUSHING
CLERK OF CIRCUIT COURT
SARASOTA COUNTY FLORIDA

FOURTH AMENDMENT AND RESTATEMENT OF TRUST

THIS AMENDMENT AND RESTATEMENT OF TRUST, made and entered into
this 18 day of May, 1993, by and between
W. SEYMOUR SMITH and ALICE FARNY SMITH, as Grantors, and W. SEYMOUR
SMITH and ALICE FARNY SMITH, as Trustees,

WITNESSETH:

WHEREAS, the Grantors entered into a certain Trust Agreement
dated April 17, 1975, as amended by First Amendment dated
December 2, 1981, by Second Amendment dated October 31, 1983 and by
Third Amendment dated February 12, 1993; and

WHEREAS, pursuant to the provisions of Article 2 of said Trust
Agreement, the Grantors reserve the right to alter or amend the
Agreement at any time; and

WHEREAS, the Grantors desire to amend said Trust Agreement
pursuant to the reserved power contained therein;

NOW, THEREFORE, Grantors hereby amend said Trust IN TOTO, so
that as amended the same shall hereafter read as follows:

Compare and Confirm

Confirm that the extracted information from each part of your document is accurate. Only change information that does not accurately reflect what is in the document you uploaded.

PDF Preview Document Highlights

Overview

Document Type	Trust
Restatement or Amendment	Yes
Trust Name	The W. Seymour Smith And Alice Farny Smith Revocable Living Trust
Individual or Joint Trust	Joint
Trustor	W. Seymour Smith
Trustor	Alice Farny Smith
Governing State	Florida
Trust Creation Date	April 1975
Date of Restatement	May 18 1993

Confirm & Continue

Wealth.com uses LLMs for pattern recognition within established estate planning documents. We have custom-trained LLMs on hundreds of trusts and wills so that the models recognize patterns in the way different T&E attorneys may draft provisions within the documents. Wealth.com leverages these specially conditioned models to be able to extract the key information from estate planning documents within seconds. Wealth.com will also provide citations for exactly where each extracted data point was found within the document, enabling easy verification. This tool enables advisors to efficiently get up to speed on the current construct of client estate plans.