



# Family Law Software

## Quickstart Guide

### For Financial Planners and Accountants

This brief guide will get you up and running with quick questions and answers about Family Law Software.

#### **1. How do I start a new client file?**

Click the Files tab > New.

#### **2. How do I set the software up to run on a network?**

First, create a new folder on your network server for your Family Law Software client files. (If you are not comfortable doing this, you may want to get a tech person to help. It will be easy for him or her.) We suggest that you name the folder "Family Law Software." Then, save one client file into that folder, or open one client file from that folder. From that point onward, the software will remember to use that folder. You need to do this step of saving into or opening a client file from the folder once for each computer that is running the software.

#### **3. How do I enter the client's financial information?**

Click the Planner tab and then each link along the left under the heading "Enter Data Here."

#### **4. How do I view the software's reports?**

Click the Planner tab and then the Reports link (the last link on the left).

#### **5. Which reports are most useful?**

The Budget Report and the Division of Marital Property report get used in every case. The Projected After-Tax Cash Flow and the Projected Net Worth are also frequently used.

#### **6. How do I find the child support amount?**

If you are in one of the 20 states where we calculate child support (\*), just click the Child Support link on the Planner tab. For details on the inputs that are most relevant, click the link

on that screen labeled "Click here for the Child Support Calculator." For more details on the calculation itself, click the Guidelines tab of the software and each screen there.

(\*) The states where we calculate child support are: California, Connecticut, Colorado, Florida, Georgia, Illinois, Massachusetts, Maryland, Minnesota, Missouri, Mississippi, North Carolina, New Jersey, New York, Nevada, Pennsylvania, Rhode Island, Texas, Virginia, and Washington state.

## **7. How can I use the software to figure out spousal support?**

In Pennsylvania, California, and New York, there are explicit spousal support guidelines for temporary spousal support, and the software calculates those.

In those states, and all the others, spousal support longer term is a matter of negotiation between the parties.

The software will help you try different levels of spousal support, and see what seems fair to all parties.

You will find the primary screens for that on the Negotiate tab, on the screens under the heading "What If/Payments."

## **8. How can I use the software to help the parties reach agreement on the division of assets?**

Use the Property Division worksheet. This worksheet shows each of the assets you have entered and has a place for you to enter how much of each asset each party is keeping. Optionally, you may also show an equalization payment, which shows how far the parties are from a 50/50 division. If you do this live, with the parties present, you will find that this tool is very engaging, and that the parties will use it to reach resolution more quickly.

## **7. How can I use the software to ask "what if" about different levels of child support, spousal support, exemptions, and tax filing status?**

Use the "What-If Analysis" screen and the other "what if" screens. These are easy to use and very powerful in terms of showing the alternatives. All of the tax calculations are full tax calculations. So the tax impact of all of these "what if" scenarios takes into account such things as changes in tax brackets, the Alternative Minimum Tax, the Child Tax Credit, the Earned Income Credit, etc. On the What-If Analysis screen, you can create up to 12 scenarios in a single file.

For more involved analyses, such as whether or not to sell a residence, you should create two versions of the file that are identical except for the things you wish to compare. Then print the relevant reports from each version of the case file.

To create a copy of the current file under a new name, click the Files tab, then the "Save As" button.

**8. How can I find the amount of spousal support needed to enable the parties to have a 50/50 (or other) division of cash available for living expenses?**

Click the Negotiate tab > Alimony Calculator link. Enter the desired percent, and the software will show you the amount of alimony needed to get there.

**9. How can I see the detail behind the tax calculations?**

Click Planner tab > Reports > View/Edit Taxes.

**10. How can I set my client up to send me his or her data electronically?**

Click Files tab > Get Client Started. Enter the client's name and e-mail address and click the link below those entries. Your client will receive an e-mail, with a link to download the Family Law Software Client Edition. (This is free with your subscription.) The client will use the Client Edition to enter his or her data. The client will then e-mail you the file, which you will save into your Family Law Software folder. Start Family Law Software, then open the file.

Please note that there is no way to combine two client files. So if this is a mediation or collaborative context, and you are collecting data from both parties, you will have to manually enter data from one party into the data file started by the other party.

**11. May I install the software on an assistant's computer?**

Yes, you are permitted to install the software on the computers of assistants at no additional charge. You may also install the software on your own computer at home and laptop at no additional charge. Simply enter your own name and KeyCode at the startup screen.

**12. When I get a new computer, how do I transfer the software to it?**

Simply download the software again from our website: [www.FamilyLawSoftware.com](http://www.FamilyLawSoftware.com). Enter your name and KeyCode at the startup screen.

Then, move or copy all of your client files from your old computer's Family Law Software folder into your new computer's Family Law Software folder. If you store the Family Law Software files on a network server, there is no need for this step. You can see the location of the Family Law

Software folder by clicking the Files tab. It will be one of the first couple of lines at the top of the screen.