

2 Before You Produce a Document

This chapter contains the information you need to use **It's Legal** effectively. In this chapter, you'll find information on:

- * Using Personal Information to streamline document creation.
- * Reviewing legal issues about **It's Legal's** documents.
- * Preparing legal documents for others.
- * Understanding document variations.

Entering Personal Information

The Personal Information feature simplifies document creation by storing personal details about you and other people you want to include in your legal documents. You can access Personal Information via the Personal button on the tool bar, the Document menu, or by pressing **F2** from most program locations. The Personal Information window appears (see Figure 2-1).

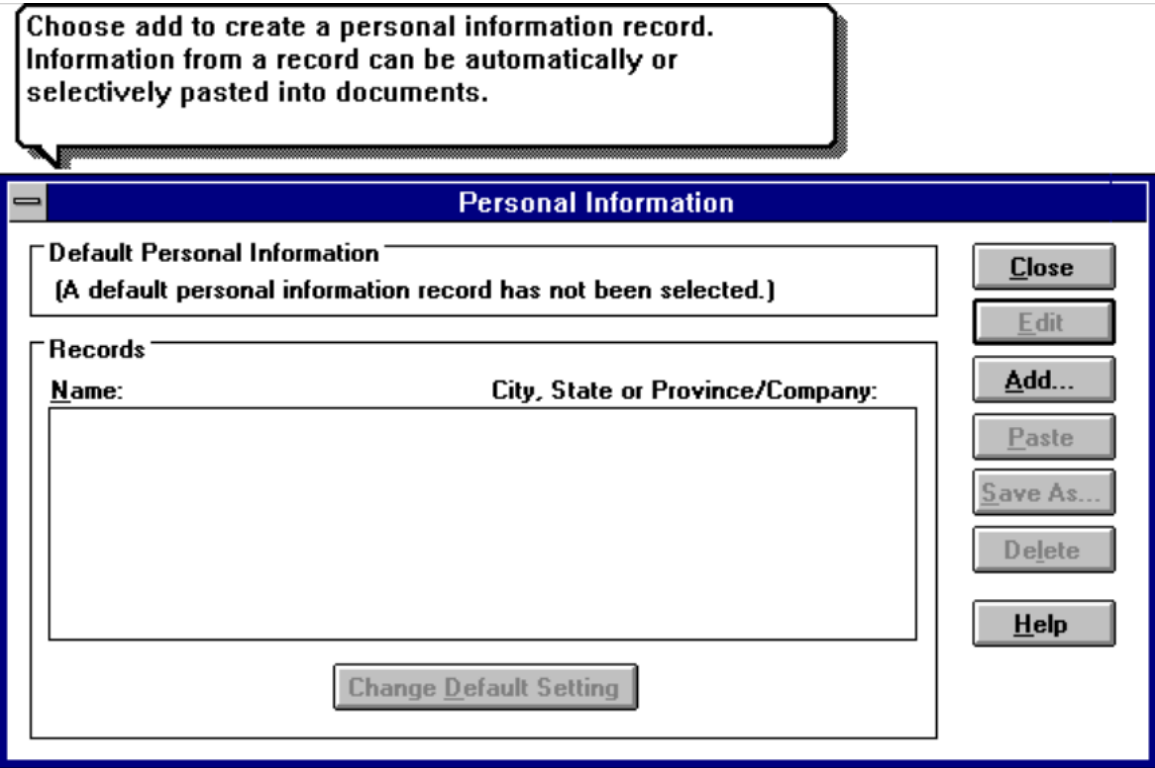


Figure 2-1. Personal Information Window

The Quick Tips shown above the current window (as illustrated in Figure 2-1) provide instructions for entering your personal information records. You'll use the command buttons to enter and maintain your Personal Information records.

To add a record,

1. Click the Add button on the Personal Information window.
2. On the Add Personal Information dialog that appears, choose the type of record you want to create: Individual or Business. Individual records are ideal for your spouse, children, or friends. Business records are meant to describe people and their relationship to a company.
3. On the Information window that opens, complete the appropriate fields. The Quick Tips above the window tell you what to enter in each field. Press **Tab** to move from field to field (pressing **Enter** saves the current record).

If you are creating a business record, a Details button appears on the Information window. Click this button to identify the relationship between a person and a company (such as officer, director, shareholder, employee).

4. After entering your personal information, click OK on the Information window to add the record to the Personal Information window.

Your Default Personal Information Record

The program designates the first Personal Information record you enter as the "default" record. Details from your default record are automatically inserted into the appropriate fields of any new documents you create. This saves you time and reduces errors since you won't be retyping information over and over.

You can change the default at any time by highlighting any record in the Personal Information window and clicking the Change Default Setting button. If you do *not* want a default record, you can remove the default option by highlighting the current default record and clicking the Change Default Setting button. Later, you can mark a new default record or choose the original again.

Using Personal Information to Simplify Document Creation

The Personal Information records you enter make document creation fast and easy. When you create a new Simple Will document, for example, your name and address are automatically transferred from your default record into the appropriate fields at the beginning of the document.

You can also paste data from other Personal Information records directly into your documents. For example, you can paste the names and addresses of your witnesses into your Simple Will. You can also use the Paste feature if you want to create legal documents for someone else by

pastings details from another Personal Information record over your default data. See Chapter 3 for more information on pasting Personal Information into your documents.

Editing Personal Information Records

To edit any Personal Information record, highlight the desired record in the Personal Information window and click the Edit button. On the Information window that opens, make the necessary changes. When you are finished with your modifications, click OK to save the changes and return to the Personal Information window.

Copying Personal Information Records

If you want to create a new Personal Information record with much of the same data as an existing one, you can copy the existing record to create a new record with the same entries. This feature is handy for entering individuals residing at the same address or employees of the same company, for example.

To copy a Personal Information record, highlight the desired record and click the Save As button. On the selection dialog that opens, choose the type of record you want to create: Individual or Business. The new record appears on screen with the relevant data copied into the appropriate fields. Modify the data as needed, then click OK to save the record and add it to the Personal Information window.

Deleting Personal Information Records

To delete a record listed on the Personal Information window, highlight the desired record and click the Delete button. On the Warning dialog that appears, click Yes to delete the record or click No to return to the Personal Information window and leave the record intact. If you delete the default Personal Information record, the default will be left unassigned until you designate another default record. **Note:** Even if you delete a record, that information still remains in any documents you created previously.

Legal Assistance for It's Legal's Documents

The online Legal Guide that accompanies **It's Legal** provides important general information that is designed to clarify and explain legal subjects that you may encounter as you prepare **It Legal's** documents. Before you produce any legal documents, check the Legal Guide for legal information and issues about the specific documents you want to create. You can access the Legal Guide from the Help menu, the tool bar, or by pressing **Ctrl+F1** from most program locations. If you need further assistance, you may want to contact a lawyer, particularly if your problem is unique or complex.

Preparing Legal Documents for Others

Generally, most (if not all) states have laws restricting or limiting legal services by persons who have not received legal training. The theory supporting such laws is that the general public needs to be protected from the possibility that persons who lack proper training will provide inappropriate or incorrect legal advice or services.

There are several exceptions regarding legal services, however. For example, preparing income tax returns is a legal service not limited to lawyers. Similarly, real estate agents frequently prepare deeds and other real estate documents.

You may be able to use **It's Legal** to prepare documents for family members and friends free of charge, if this is permitted by your state laws. If you charge for such services, it is more likely that you will have a problem. Contact a lawyer who is familiar with the laws in your state if you have further questions.

Understanding Document Variations

Be aware that some documents vary from state to state due to differences in state laws. For example, a Living Will created for a Wisconsin resident may not resemble one for someone in Florida. Since laws can change as new statutes are written and cases are decided, you may wish to review your documents periodically as well as the applicable state rulings. However, documents executed previously are generally still valid even if laws change. You can consult a lawyer to ensure that your documents comply with your state's laws.

NOTE: Some of **It's Legal's** documents may not be valid in Louisiana. Also, **It's Legal** cannot generate legal documents for persons living in U.S. possessions (such as Puerto Rico and the Virgin Islands).