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?

If you would like the *client* to take the first pass, click Files & Settings > Open/Save/Send > New Client.

If you would like to enter the data *yourself*, click Files & Settings > Open/Save/Send > New.

2. How do I enter the client's financial information?

Click Client Info, and look in the left margin for the links relating to that information.

Click each link in turn and fill in the screens that appear.

On some screens there are also links across the top. Click each of those as well.

3. How can I enter information for child support?

If you are in one of the 22 states where we calculate child support (*), click Client Info, and look in the left margin for the link(s) relating to child support. Click those link(s), and fill in the screens.

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

4. 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 click Files & Settings > Open/Save/Send > Settings > Change Default Folder. Navigate to and select your network Family Law Software folder.

Do this for each computer that is running the software.

5. How can I view the software's reports?

Click Forms & Reports.

6. 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.

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

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

In other states (and sometimes in those mentioned above), spousal support 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 many screens for that on the Analysis and Negotiation tab.

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

Use the Analysis & Negotiation > Property Division screen.

This screen 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 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.

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

Use Analysis & Negotiation > What-If Analysis 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 on the "what if' screens 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.

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 Files & Settings > Open/Save/Send > Save As.

10. 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 Analysis & Negotiation > Spousal Needed. Enter the desired amount or percent, and the software will show you the amount of spousal support needed to get there.

11. How can I see the detail behind the tax calculations?

Click Forms & Reports > View/Edit Taxes.

12. 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.