

Upload Estate Hub Documents for Clients

1 Navigate to <https://app.fpalpha.com/advisor/clients>

Clients

Client list summary

Household

0

Business owners

0

Retired

0

Average Net worth

\$0

Company credits

Tax planning

Unlimited credits

Home insurance

0 Requested 15 Remaining

Estate planning

0 Requested 30 Remaining

Auto insurance

0 Requested 15 Remaining

Renewal date Feb 05, 2026

Favorite clients

★ Henry C. & Mary Price

⊕ Add new client

Filter

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view	
★  Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023 	Snapshot 	Snapshot 	Snapshot 	Aug 1, 2025 09:27	
 John E Adamson Demo client	\$9,000,000.00	Tax year 2022 	Snapshot 	Snapshot 	Snapshot 		

30



2 Click on your client file

You are now in your client list

Clients

Client list summary

Household 0

Business owners 0
Retired 0
Average Net worth \$0

Company credits

Renewal date Feb 05, 2026

Tax planning
Unlimited credits

Home insurance
0 Requested 15 Remaining

Estate planning
0 Requested 30 Remaining

Auto insurance
0 Requested 15 Remaining

Favorite clients

★ Henry C. & Mary Price

+ Add new client

Filter

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view
★ Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023	Snapshot	Snapshot	Snapshot	Aug 1, 2025 09:27
John E Adamson Demo client	\$9,000,000.00	Tax year 2022	Snapshot	Snapshot	Snapshot	

3 Click "Data & Documents"

Henry C. & Mary Price 56%/100%

Client list

Client Dashboard

Data & Documents

Snapshots

Insights

Task manager

Simulators

Reports

Henry C. Price
Male, 39
Business owner Actuary at Metlife

Mary Price
Female, 37
Same Address

Actions

Household Summary

\$14,000,000 Net-Worth **56 / 100%** Optimization Level

Married 3 Children Oregon

Analysis By Area

Add New Area

Tax Planning

72% / 100%
3 tasks to complete

Tax Return year
2024

Filing Status
Married Filing Jointly

Adjusted Gross Income
0

Federal Tax Bracket
10%

4 Click "Upload Estate Documents" / "View Estate Hub"

The screenshot shows the 'Client Dashboard' with a sidebar on the left containing icons for 'Data & Documents', 'Snapshots', 'Insights', 'Task manager', 'Simulators', and 'Reports'. The main content area is divided into sections: 'General Questionnaire', 'Tax Planning', 'Estate Planning', 'Home Insurance', and 'Auto Insurance'. Each section has a 'View' button and a list of documents. The 'Estate Planning' section is highlighted with an orange circle around the 'View Estate Hub' button.

Area	Documents uploaded	Upload date	Snapshot generated	Insights generated
Tax Planning	Tax year 2023.pdf	02/04/2025	✓ Tax year 2023	✓ Instant
Estate Planning	henry-will.pdf price joint trust.pdf henry hcd.pdf 4 more	02/04/2025	✓ 02/04/2025	✓ In-Depth
Home Insurance	Henry-home-primary-residence.pdf Henry-umbrella.pdf	02/04/2025	✓ 02/04/2025	✓ In-Depth
Auto Insurance	Henry-auto.pdf	02/04/2025	✓ 02/04/2025	✓ In-Depth

5 Click "Upload" and select the client's Will

Repeat this step on the right side of the screen (if applicable) for the co-client

The screenshot shows the 'Upload Documents' page for 'Henry C. & Mary Price'. The page is divided into two columns: 'Henry C. Price's Documents' and 'Mary Price's Documents'. Each column has an 'Upload' button and a 'Will in PDF' button. The 'Upload' button for Henry C. Price's Will is highlighted with an orange circle.

Ready | 3 Remaining today | 30 Remaining | [See upload details](#)

Upload Documents | **Estate Data**

Upload documents for Henry C. & Mary Price ⓘ
Only upload documents where the Client or Co-Client is the Trustor or Testator

Henry C. Price's Documents

Upload only Henry C. Price's **Will** in PDF

Upload | **Will in PDF**

Last upload
henry-will.pdf | Date: 02/04/2025 ⓘ

Upload only Henry C. Price's **Revocable Trust** in PDF

☒ Joint ☐ Individual

Mary Price's Documents

Upload only Mary Price's **Will** in PDF

Upload | **Will in PDF**

Last upload
Mary-will.pdf | Date: 02/04/2025 ⓘ

Thank you for letting us know the Trust for this household is joint! **No need to upload it again.**

[Security Policy](#) | [Confirm documents](#)

6 Click "Upload" and select the Joint Revocable Trust

If your clients have individual Revocable Trusts, select "Individual" and upload the client's Revocable Trust here

Repeat this step on the right side of the screen (if applicable) for the co-client

The screenshot shows the 'Upload Documents' tab selected. At the top right, there are status indicators: 'Ready', '3 Remaining today', and '30 Remaining'. A 'See upload details' link is also present. The interface is split into two columns. The left column is for 'Henry C. Price's Revocable Trust in PDF'. It shows an 'Upload' button circled in orange, a 'Will in PDF' button, and a 'Last upload' section with 'henry-will.pdf' dated '02/04/2025'. Below this, there are radio buttons for 'Joint' (selected) and 'Individual'. Another 'Upload' button is circled in orange next to 'Revocable Trust in PDF'. The 'Last upload' section shows 'price joint trust.pdf' dated '02/04/2025'. The right column shows a message: 'Thank you for letting us know the Trust for this household is joint! No need to upload it again.' with a large alpha symbol. At the bottom, there is a 'Security Policy' link and a 'Confirm documents' button. A small '30?' icon is in the bottom right corner.

7 Click "Upload" to include the client's Irrevocable Trusts, Power of Attorney, Healthcare Directive, Will Codicils, Trust Amendments, or Trust Restatements

The screenshot shows the 'Upload Documents' tab selected. At the top right, there are status indicators: 'Ready', '3 Remaining today', and '30 Remaining'. A 'See upload details' link is also present. The interface is split into two columns. The left column is for 'Henry C. Price's Additional Estate Documents in PDF'. It shows an 'Upload' button circled in orange, and a 'Last upload' section with two items: 'henry hcd.pdf' dated '02/04/2025' and 'henry poa.pdf' dated '02/04/2025'. The right column is for 'Mary Price's Additional Estate Documents in PDF'. It shows an 'Upload' button, and a 'Last upload' section with two items: 'mary hcd.pdf' dated '02/04/2025' and 'mary poa.pdf' dated '02/04/2025'. At the bottom, there is a 'Security Policy' link and a 'Confirm documents' button. A small '30?' icon is in the bottom right corner.

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Click "Confirm documents"

fpalpha [Go back to Data & Documents](#)[Go to Client Dashboard](#)

Estate Planning Data

[Upload Documents](#)[Estate Data](#)

Snapshot Requests

Ready

Available requests

3 Remaining today

Company credits

30 Remaining

[See upload details](#)

Additional estate documents (Only apply for The Estate Snapshot)

- Power of Attorney Documents (POAs)
- Healthcare Directives / Living Wills
- Revocable Trust Restatements or Amendments
- Will Codicils
- Irrevocable Trusts

Upload only Henry C. Price's Additional Estate Documents in PDF

[Add](#)

Add up to 10 documents

Last upload

 henry hcd.pdf	Date	02/04/2025	
 henry poa.pdf	Date	02/04/2025	

Complete 635.0 KB 

Upload only Mary Price's Additional Estate Documents in PDF

[Upload](#)

Additional Estate Documents in PDF

Last upload

 mary hcd.pdf	Date	02/04/2025	
 mary poa.pdf	Date	02/04/2025	

[Security Policy](#)[Confirm documents](#)

9

Click here.

The screenshot shows the 'fpalpha Alpha' client dashboard. A modal titled 'Confirm documents' is open, with the subtitle 'Once you click "Confirm" your documents will be uploaded.' The modal contains an 'IMPORTANT NOTICE' section with the following text: 'Before uploading, please confirm the following:'. Below this are three bullet points: 'I understand that **only documents uploaded now, where the client or co-client is the trustor or testator**, will appear in the snapshot. (Re-upload even if added in a previous snapshot)', 'I have opened each document to make sure all pages are included.', and 'I have confirmed that no documents are missing for this household.' A yellow callout bubble points to a checkbox labeled 'I have read and agree to the above'. Below the callout is a section titled 'Additional Estate Documents' with a list of documents. At the bottom of the modal are 'Cancel' and 'Confirm' buttons. The background shows the 'Estate Planning' section with a list of documents and a 'Go to Client Dashboard' button.

fpalpha Alpha

Go back to Data & Documents

Go to Client Dashboard

Estate Planning

Upload Documents

Additional Estate Documents (Snapshot)

- Power of Attorney
- Healthcare Directive
- Revocable Trust Agreement
- Will Codicil
- Irrevocable Trust Agreement

Upload Documents

Last uploaded: 1/1/2024

Company credits

0 Remaining

See upload details

Confirm documents

Once you click "Confirm" your documents will be uploaded.

IMPORTANT NOTICE

Before uploading, please confirm the following:

- I understand that **only documents uploaded now, where the client or co-client is the trustor or testator**, will appear in the snapshot. (Re-upload even if added in a previous snapshot)
- I have opened each document to make sure all pages are included.
- I have confirmed that no documents are missing for this household.

Adding documents later will use a full credit as a new case

☐ I have read and agree to the above

Additional Estate Documents

Cancel Confirm

Security Policy

Confirm documents

30 ?

10 Click "Confirm"

The screenshot shows the 'fpalpha' client dashboard with a 'Confirm documents' modal open. The modal contains an 'IMPORTANT NOTICE' section with instructions on document uploads and a list of items to confirm. A 'Confirm' button is highlighted with an orange circle.

fpalpha 

[Go back to Data & Documents](#) [Go to Client Dashboard](#)

Estate Plan

[Upload Documents](#)

Additional Documents (Snapshot)

- Powers of Attorney
- Health Care Directives
- Revocable Trust Agreements
- Will Codicils
- Irrevocable Trust Agreements

[Upload Documents](#)

Last uploaded: 10/10/2023

Matt Smith

Company credits: 0 Remaining

[View upload details](#)

Confirm documents

Once you click "Confirm" your documents will be uploaded.

 **IMPORTANT NOTICE**

Before uploading, please confirm the following:

- I understand that **only documents uploaded now, where the client or co-client is the trustor or testator**, will appear in the snapshot. *(Re-upload even if added in a previous snapshot)*
- I have opened each document to make sure all pages are included.
- I have confirmed that no documents are missing for this household.

 **Adding documents later will use a full credit as a new case**

☒ I have read and agree to the above

Additional Estate Documents

 635.0 KB

[Cancel](#) [Confirm](#)

[Security Policy](#) [Confirm documents](#)

30 ?