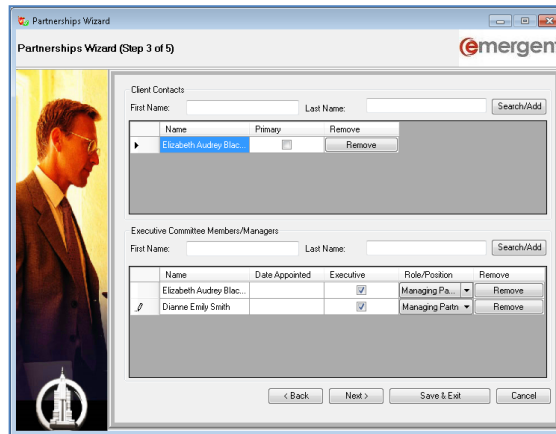


Partnerships Wizard

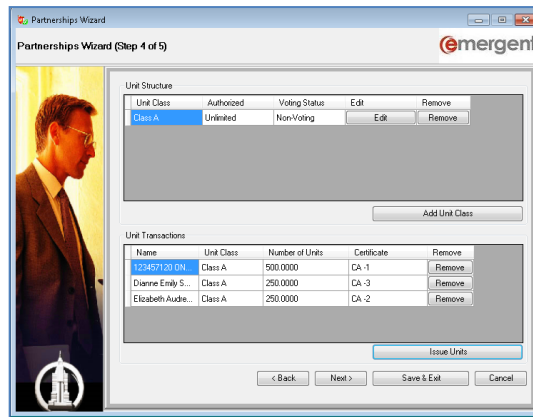
An easy-to-use wizard guides you through the Partnership formation process. The first step gathers information concerning the new entity, including the **name and address of the partnership**. *If the Partnership Wizard was started accidentally, cancel at this point and a new file will not be created.*

Step 2 of the wizard allows for the Addition of Partners and Officers of the Partnership.

Step 3 involves the inclusion of the **Client Contact** at the Partnership and **Managers** and **Executive Committee Members**. Executive Committee Members are Managers that have the Executive checkbox checked.



Step 4 allows for the creation of **Unit Classes** and the **Issuance of Units**.



Note: Even if no Units are being issued, it may be useful to create a Unit Class limited to 100 shares and issue them to reflect partnership percentages. Units can then be transferred for the purposes of documentation, etc.

The Final Step of the process allows for the setup of **Capital Contributions** and **Partnership Interest** as well as **Generating a Partnership Package**.

