

Fast•Class File

Client Data System

Dynamic Report Download

IRA Contribution History Dynamic Report (from January 2000)

The IRA Contribution History report is a dynamic report that will display a list of IRA accounts showing the contribution history (and amounts of each contribution) over a specified period of time. In the case of this report, contributions from January of 2000 will be listed. The organization of the report will make it easy to determine which clients have made contributions for the current tax year, which clients have yet to make a contribution, and which contributors have not reached their contribution limit and can contribute more to their IRA accounts.

Loading Files into CDS:

- From the main screen in CDS, select **Database** in the menu bar and then select **Utilities**.
- In the **Utilities** menu, select **Load Data**.

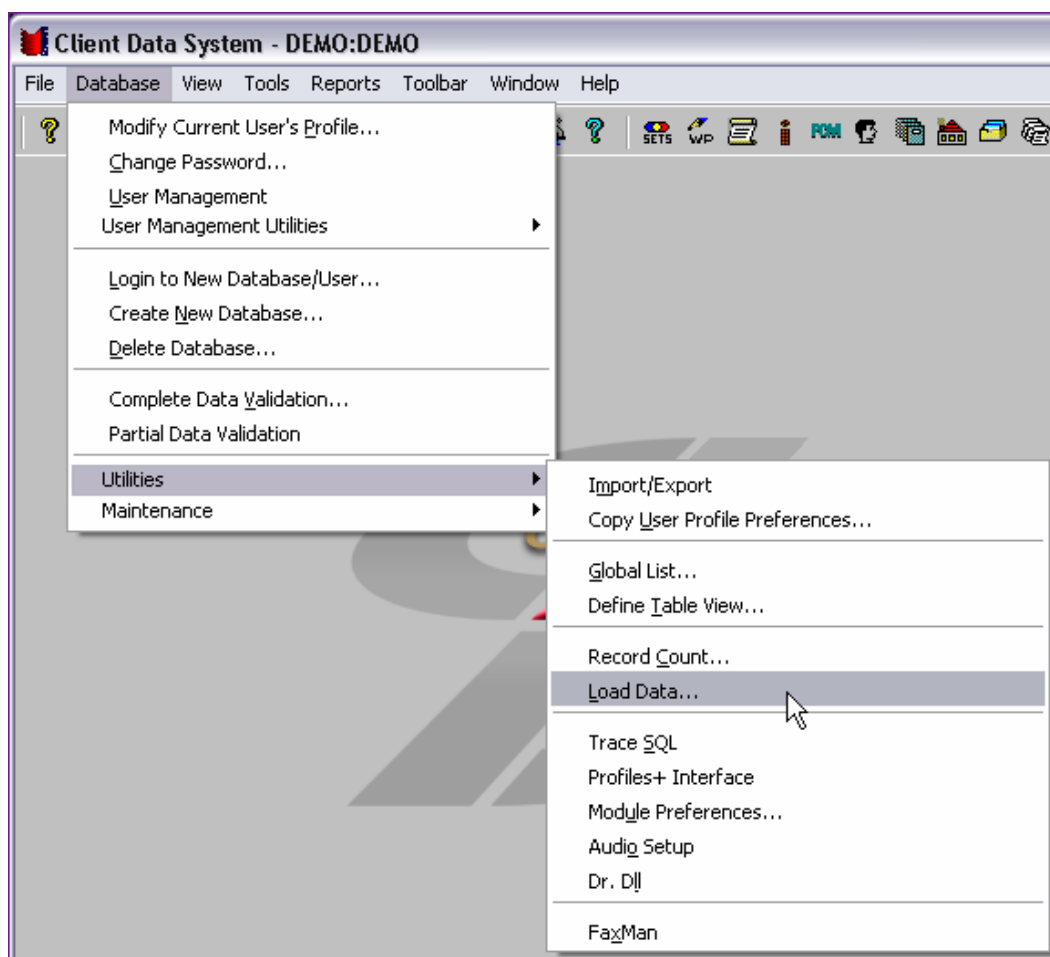


Figure 1: The Utilities menu (Load Data option selected).



- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.



Figure 2: The Select Data Load Options window.

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the **IRA_Hist** folder.

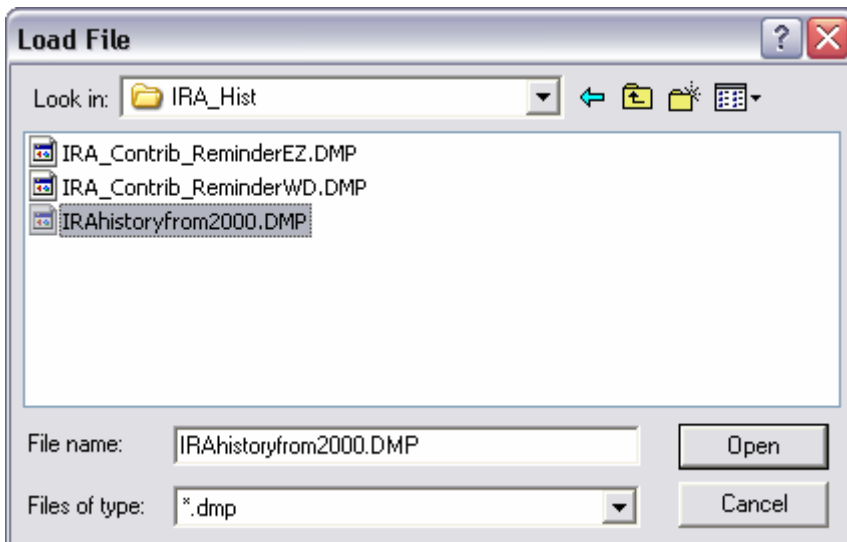


Figure 3: The contents of the IRA_Hist folder viewed from the Load File window.

The **IRA_Hist** folder contains three .DMP files:

- The **IRAhistoryfrom2000.DMP** containing the IRA Contribution History (from January 2000) dynamic report with included filters.
 - The **IRA_Contrib_ReminderWD.DMP** file with the IRA Contribution Reminder letter in Microsoft Word format.
 - The **IRA_Contrib_ReminderDEZ.DMP** file with the IRA Contribution Reminder letter in E-Z Editor format.
- Select the **IRAhistoryfrom2000.DMP** file and click **Open**. The Life Settlement Prospects dynamic report with filters will be loaded into CDS.
- Using the same process (Starting from the main screen of CDS, select **Database > Utilities > Data Load...**), load one of the included approach letters.

Using the IRA Contribution History (from January 2000) Dynamic Report:

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type **IRA Contribution** and click **OK**.
- A summary screen will open with the **IRA Contribution History (from January 2000)** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **IRA Contribution History (from January 2000)** dynamic report and click the **Modify Record** button.

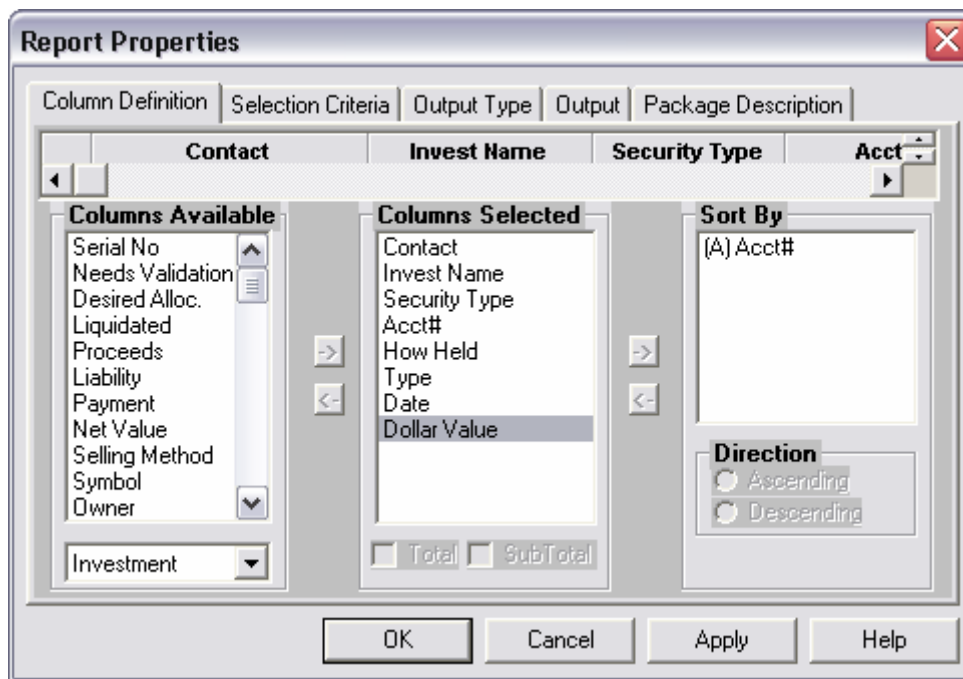


Figure 4: The Report Properties window of the IRA Contribution History (from January 2000) dynamic report.

- To run the **IRA Contribution History (from January 2000)** dynamic report, double-click the report or select the report and click the **Run** button.

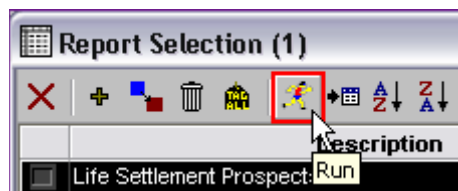


Figure 5: The Run button in the Report Selection Summary screen.

Using the IRA Contribution Reminder Letter:

- After running the **IRA Contribution History (from January 2000)** dynamic report, select records in the results and click the **Spreadsheet Correspondence** button.
- Select **Form Letter** in the **Spreadsheet Correspondence** window.
- Enter **IRA Contribution** in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **IRA Contribution Reminder** letter and other options in the **Print/Fax/E-mail Form Letter** window and click **Print**.

Date	Description	Modified	DocType
08/02/1997	IRA Contribution Reminder	04/07/2005	E-Z Editor

Address Selection

☒ Preferred Address
☐ Residence Address
☐ Business Address

Letter Log Storage Option

☐ Link to Form Letter Only
☒ Hardcopy to Client
☐ No Letter Log Storage

Print/Fax/E-mail

☒ Print
☐ Send Fax
☐ E-mail
☐ E-mail as Attachment

Sort By

☐ Last Name
☒ Zip Code

☐ Create Follow-up Activity
☐ Print One Per Family

Print Cancel Contacts... Help

Figure 6: The Print/Fax/E-mail Form Letter window.

- Review the letters and click **Print** to send to prospects.

Modifying the IRA Contribution Reminder Letter:

- From the main screen in CDS select **Tools** in the main menu and then select **Form Letter Maintenance**.
- Enter **IRA Contribution** in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **IRA Contribution Reminder** letter in the **List of Form Letters** summary screen and click the **Modify Record** button.

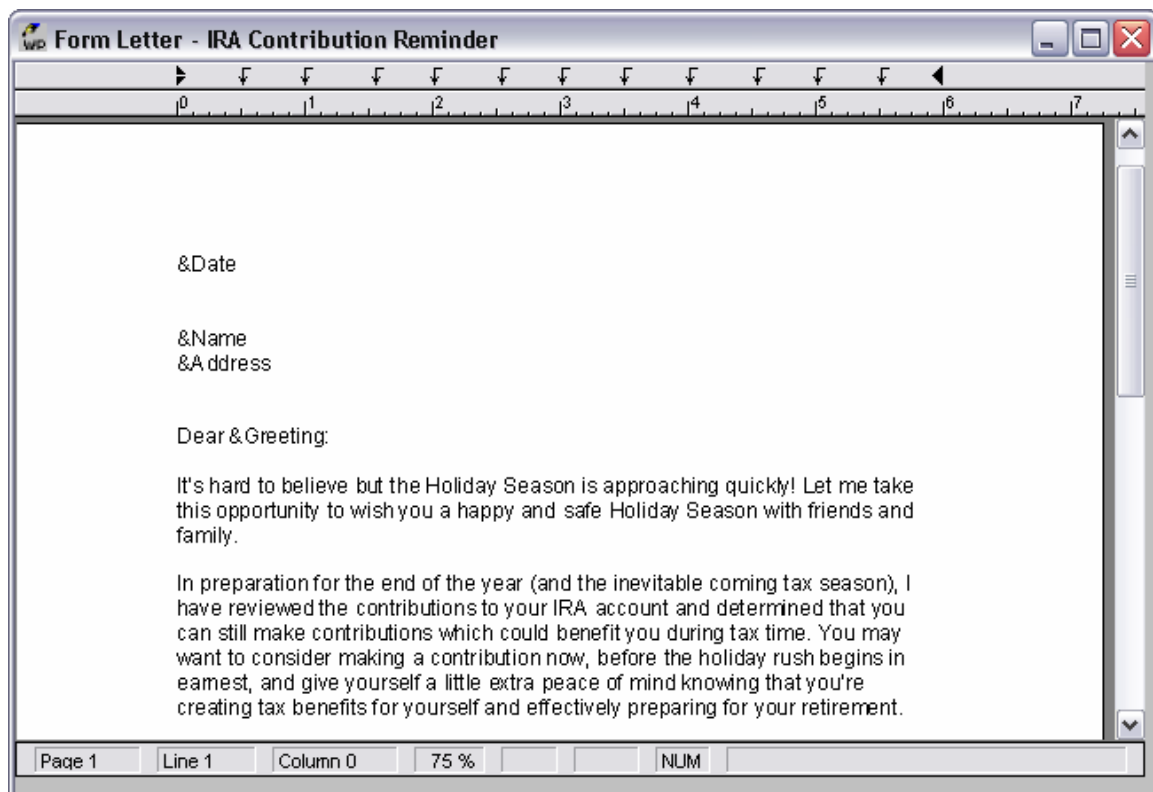


Figure 7: IRA Contribution Reminder Letter (E-Z Editor version).

- Modify as needed.
- When finished, close the document and (if needed) make any changes to the name of the document in the **Form Letter Description** window and click **OK** to save changes.