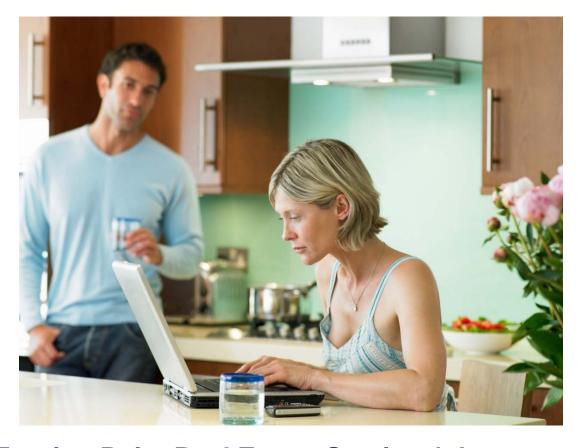
# Introduction





Welcome to Turning Point Real Estate Services' demonstration of our proprietary, innovative and secure on-line system. We have designed this tool so you can monitor or participate directly in the management and disposition of the property you have entrusted to us.

# **About Turning Point**





Whatever your property-management needs – including valuation and inventory, sale and disposition of the property and its contents, maintenance, repair and grounds services, Turning Point is here for you.

# Website Overview







HOME

**OUR MISSION** 

**OUR AREAS OF EXPERIENCE** 

ESTATE AND PROBATE

WHEN SENIORS DOWNSIZE

**REO SERVICES** 

OUR SUITE OF TRANSITION SERVICES

FORMS DOWNLOAD

#### A Comprehensive Solution

Turning Point provides a complete spectrum of professional solutions for people who own property and are in transition. By integrating real estate brokerage, property management, real estate appraisal, general contracting and senior living services, our firm delivers a comprehensive service solution for:

- Executors, trustees & families dealing with estate settlement
- Seniors who are contemplating downsizing or relocating
- Aging in-place consultation and solutions to ensure independence, accessibility and safety
- Assistance with divorce settlements
- · Job and career related changes

#### Where can you turn?

When a loved one passes, who helps to close down the estate and clean out the house? When a senior decides to downsize who manages the exhaustive task of sorting through belongings that have accumulated over a lifetime? When a marriage dissolves and properties must be divided, who has the tools to objectively assist you under such strain? These are just a few typical but overwhelming situations where who you call to assist you can make a world of difference. You may already realize that there's much to be done if you are to optimize the property's potential. You need someone who can do more than give advice you need someone to turn to, someone who can take over the many tasks ahead to make the process as stress-free as possible. You need Turning Point.

As you've seen from visiting our Web site, you will get an overview and explanation of our many value-added services. The powerful on-line utility you are about to review has been created to help executors and trustees who must manage the disposition of property left to them; couples going through divorce or other life-changing transitions; families helping a senior move into an care facility; and similar scenarios where you need to simplify the many complex tasks involved.

# Client Log In







HOME

**OUR MISSION** 

**OUR AREAS OF EXPERIENCE** 

ESTATE AND PROBATE

WHEN SENIORS DOWNSIZE

**REO SERVICES** 

**OUR SUITE OF SERVICES** 

FORMS DOWNLOAD

PRINCIPALS/CONTACT US

SECURE CLIENT LOG IN

Your first step will be to log in with a unique user name and password we create for you. This site supports a Client Administrator, and Client Users. If you are the Client Administrator, only you have this primary access and ability to make decisions. You will be able to add other Client Users who have view-only access (all users may post messages). Only the Client Administrator and Turning Point will be able to view AND update the site, post items, etc.

# Client Log In







HOME

**OUR MISSION** 

**OUR AREAS OF EXPERIENCE** 

**ESTATE AND PROBATE** 

WHEN SENIORS DOWNSIZE

**REO SERVICES** 

**OUR SUITE OF SERVICES** 

FORMS DOWNLOAD

PRINCIPALS/CONTACT US

SECURE CLIENT LOG IN

### Client Login

Username	John Sample
Password	••••
	Login

After you've logged in, you will see a dedicated home page especially created for your on-line property-management service. This screen allows you access to a variety of key functions, including tracking activity, messages, managing inventory, and controlling who else may view information. You give us your directions and we do all the work.

# Client Home Page - Messages





Real Estate Services, LLC

Welcome, John Sample! 7/27/2009

#### John Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

#### Home

As the Client Administrator, you may add Client Users and are responsible for entering disposition/destination data for the inventory items. You will also have read/view access to all Activity Logs, and can determine which Activity Logs can be seen by your (Client) Users. All Users may post to the client messages area.

#### Messages

# Message Gary, Great solution! I'll contact my attorney and ask him to draw up a form and send it to me and I'll scan and email back to you. I'll also have him call you as to when someone from his office is available for the safe cracking....Thanks

View

No Documents

Log# 64 7/30/2009 Entered by: Sample, John

John, Since none of your siblings know the combination that big safe in the basement. Let me suggest this let me get a Locksmith to open it. I will need written authorization from you as Executor and I would like a third party witness for your attorneys office to be present and we will both inventory it's contents. Let me know your thoughts?

View

No Documents

Log# 63 7/30/2009 Entered by: Ferrari, Gary

Gary, Thanks for taking the time to put my mind at ease regarding the cost to move the piano, and your right For the \$200 difference Jill and I would rather have the peace of mind knowing the crating will be done the right way. Will you need the piano to stage the property? Or, can it be shipped now, it's your call. John

View

No Documents

Log# 61 7/30/2009 Entered by: Sample, John

The MESSAGE screen appears after you log in. It allows you open communication with Turning Point and other Client users. It provides an easy, quick, secure opportunity to "discuss" factors on-line and make decisions. All Users may post messages.

# Client Home Page (cont.)





Welcome, John Sample! 7/27/2009

#### Jonn Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

dollars of the original.Morgan does a	wo additional quotes on moving the piano. They are within a few wonderful job of crating. I suggest going with Morgan Manhattan problem with them I have faxed all 3 bids since your printer is	View
No Documents		
Log# 60	7/30/2009	Entered by: Ferrari, Ga
	nat as Executor I'm making decisions for all five of us. She has ne are I'll call her tonight. Thanks, John	View
No Documents		
Log# 57	7/30/2009	Entered by: Sample, John
the same Admin rights on our Websi I can have her up and running tomorr	n has contacted our office and has requested that your sister have te. If You send me back a message confirming that is your wishes ow. Currently you as Executor are the only person with Admin s means two of you will be making decisions regarding the	V I ← VV
No Documents		
Log# 56	7/30/2009	Entered by: Ferrari, G
right For the \$200 difference Jill and I	t my mind at ease regarding the cost to move the piano, and your would rather have the peace of mind knowing the crating will be piano to stage the property? Or, can it be shipped now, it's your	View
No Documents		
Log# 55	7/30/2009	Entered by: Sample, John





Welcome, John Sample! 7/27/2009

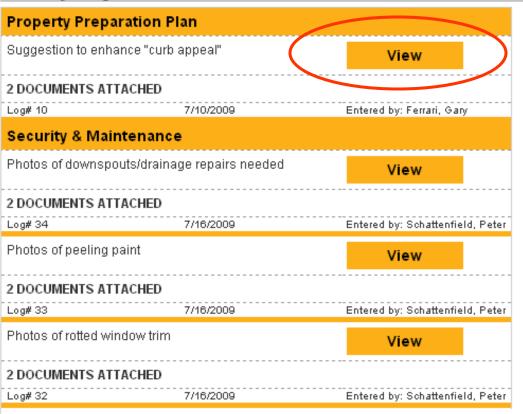
John Sample
Home Page / Messages
Add/Post Message
Activity Log
Inventory
Destinations
Search
Print All (Detail)
John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations
Add Users

Logout/Login

#### Activity Log



The ACTIVITY LOG provides access to information and updates, pertaining to: The Property Preparation Plan, Marketing & Sales, Security & Maintenance and Client Billing.





Welcome, John Sample! 7/27/2009

#### John Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

#### Property Preparation Plan For: John Sample

The following are recommendations intended to enhance the client property market appeal and prepare the property for showing.

#### General:

- Inventory contents. Post information to secure client web site.
- o Pack & disburse contents as indicated by client
- o Retain some furniture items to "stage" rooms.
- Clean "top to bottom" including windows, after all renovation work is done.

#### <u>Interior</u>:

- Kitchen needs facelift. Suggest new counter tops and cabinet doors/pulls and faucet fixtures.
- Guest bathroom is outdated. Suggest new sink/fixtures. Remove tub & install stall shower.

The property preparation plan details activities that Turning Point will conduct on your behalf in preparing and implementing details and required activities. For example, properties owned by seniors often have some degree of deferred maintenance and generational issues, typically selling below its true market value with extended marketing times. Turning Point works closely with you and recommends the work that should be done to ensure the property shows well to the buying public.





Welcome, John Sample! 7/27/2009

John Sample		
Home Page / Messages		
Add/Post Message		
Activity Log		
Inventory		
Destinations		
Search		
Print All (Detail)		
John Cample Admin		

Inventory w/o Destination Assigned Add/View Destinations

Logout/Login

Add Users

### Activity Log

Property Preparat	ion Plan	
Suggestion to enhance	c"curb appeal"	View
2 DOCUMENTS ATTAC	HED	
Log# 10	7/10/2009	Entered by: Ferrari, Gary
Security & Mainte	nance	
Photos of downspouts	drainage repairs needed	View
2 DOCUMENTS ATTAC	HED	
Log# 34	7/16/2009	Entered by: Cohattenfield,
Photos of peeling paint		View
2 DOCUMENTS ATTAC	HED	
Log# 33	7/16/2009	Entered by: Schattenfield,
Photos of rotted windo	w trim	View
2 DOCUMENTS ATTAC	HED	
Log# 32	7/16/2009	Entered by: Schattenfield,

**Another example (under Security & Maintenance)** 





TURNING POINT Real Estate Services, LLC

> Welcome, John Sample! 7/27/2009

#### John Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login



Information may be in the form of a simple typed message or as an attached spreadsheet, Word document, scanned image (above), digital photo(s) or short video clip.





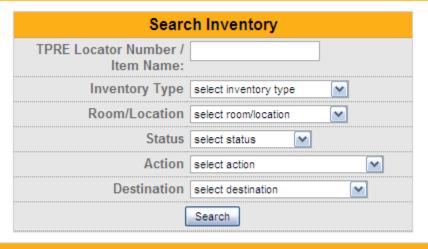
Welcome, John Sample! 7/27/2009

John Sample		
Home Page / Messages		
Add/Post Message		
Activity Log		
Inventory		
Destinations		
Search		
Print All (Detail)		

# John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

### Inventory



IDNumber <u>A Z</u>	Type <u>A Z</u> Dimensions		Location <u>A Z</u> Action <u>A Z</u>	Destination <u>A Z</u>
	Furniture	DINING TABLE InventoryID: 38	Dining Room	
	77x46730 Image Count: 1	1 Listed		Client Input: Add Action & Destination

Managing inventory can be a huge task during a life transition or when trying to direct activities from a remote location. The INVENTORY tool gives you the ability to review a complete inventory of items in or related to the property, and to decide what will happen with each of these items.





#### TURNING POINT Real Estate Services, LLC

Welcome, John Sample! 7/27/2009

#### John Sample

Home Page / Messages Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

## Inventory

	Furniture	PIANO InventoryID: 28	Livir	ig Room	Manchester, MA.
	55x54x40 Image Count: 2	1 Listed	Des	to Client ignated ress	Client Input: Add Action & Destination
	Furniture	CHECKERBOARD EN TABLE InventoryID: 57	ND	Family Room	
	16x16x21.5 Image Count: 1	1 Listed			Client Input: Add Action & Destination
N. S.	Furniture	CHEST InventoryID: 79	Bathro Downs		Manchester, MA.
	29x18x29.5 Image Count: 1	1 Listed	Ship to Design Addres		Client Input: Add Action & Destination
	Misc. Items	VASE InventoryID: 80	Bathro Downs		Habitat for Humanity
	5x11 Image Count: 1	1 Listed			Client Input: Add Action & Destination





Welcome, John Sample! 7/27/2009

#### John Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

#### Inventory







We provide a thorough photographic inventory of all major assets, using digital images. Often, estates have significant inventories, which must be carefully cataloged. Turning Point will inventory, measure and define every significant item for you, posting this information on this Web site. Once these items have been listed, a "sorting" tool allows you, for example, to view items from specific rooms, inventory types (art, furniture, rugs), or identifier numbers, rather than scrolling through an entire inventory list.





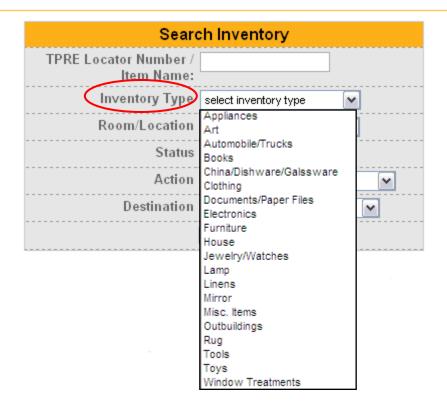
Welcome, John Sample! 7/27/2009

John Sample
Home Page / Messages
Add/Post Message
Activity Log
Inventory
Destinations
Search
Print All (Detail)

# John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

#### Inventory



You can conduct searches by inventory type, room, and identifier number, sort items as you desire, review previous directives or re-direct as required. You and approved guest users can "view" each of these items, and enlarge the image for increased acuity. You then make decisions about what should be done with the item, assigning to a specific individual or family member, selling, storage, auction, charitable donation, etc.





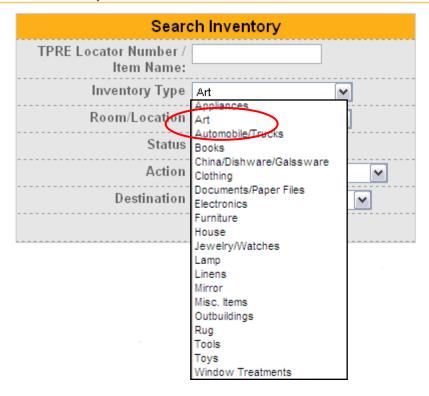
Welcome, John Sample! 7/27/2009

# John Sample Home Page / Messages Add/Post Message Activity Log Inventory Destinations Search Print All (Detail)

#### John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

## Inventory (First 25 items) See All







Welcome, John Sample! 7/27/2009

# John Sample Home Page / Messages Add/Post Message Activity Log Inventory Destinations Search Print All (Detail)

# John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

# Inventory (First 25 items) See All

Searc	ch Inventory		
TPRE Locator Number / Item Name:			
Inventory Type	Art	~	
Room/Location	select room/location	~	
Status	select room/location Basement		
Action	Bathroom Master Bathroom Upstairs Hall		~
Destination	Bathroom-Downstairs Bedroom - Master		~
	Bedroom 1 (downstairs) Bedroom 2 upstairs on left		
	Bedroom 3 upstairs on right Breakfast Room		
	Dining Room		7
	Exterior images Family Room Foyer		
	Front Porch		
	Garage Hall - Downstairs		
	Hall - Upstairs		
	Kitchen Laundry Room		
	Living Room		
	Office		
	Porch/Deck -(Screened-in) Shed		





Inventory

Welcome, John Sample! 7/27/2009

John Sample
Home Page / Messages
Add/Post Message
Activity Log
Inventory
Destinations
Search
Print All (Detail)

# John Sample Admin Inventory w/o Destination Assigned Add/View Destinations

Add Users

Logout/Login







Welcome, John Sample! 7/27/2009

John Sample		
Home Page / Messages		
Add/Post Message		
Activity Log		
Inventory		
Destinations		
Search		
Print All (Detail)		

#### John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

## Inventory

Search Inventory		
TPRE Locator Number / Item Name:		
Inventory Type	Art	~
Room/Location	Dining Room	~
Status	1 Listed	
Action	select action	~
Destination	select destination	~
	Search	

IDNumber <u>A Z</u>	Type <u>A Z</u> Dimensions	ltem <u>A Z</u> Status <u>A Z</u>	Location <u>A Z</u> Action <u>A Z</u>	Destination <u>A Z</u>
The state of the s	Art	BOATS PAINTING InventoryID: 35	Dining Room	
	35.5x30 Image Count: 1	1 Listed		Client Input: Add Action & Destination
	Art	HOUSES PAINTING InventoryID: 36	Dining Room	
	27.5x21 Image Count: 1	1 Listed		Client Input: Add Action & Destination

# Search





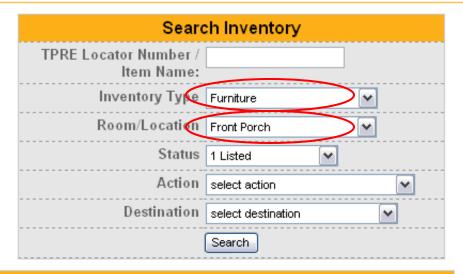
Welcome, John Sample! 7/27/2009

# John Sample Home Page / Messages Add/Post Message Activity Log Inventory Destinations Search Print All (Detail)

# John Sample Admin Inventory w/o Destination Assigned Add/View Destinations Add Users

Logout/Login

## Inventory



IDNumber <u>A Z</u>	Type <u>A Z</u> Dimensions	ltem <u>A Z</u> Status <u>A Z</u>	Location <u>A Z</u> Action <u>A Z</u>	Destination <u>A Z</u>
	Furniture	TEAK BENCH InventoryID: 133	Front Porch	Westy's
	78x29x38 Image Count: 1	1 Listed	Storage	Client Input: Add Action & Destination

## Destination





Welcome, John Sample! 7/27/2009

## John Sample

Home Page / Messages

Add/Post Message

Activity Log

Inventory

Destinations

Search

Print All (Detail)

#### John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

#### Destinations

Charitable Donation		
Habitat for Humanity		
Metropolitan Museum of Art	Mr. Curator	
Neighbor to Neighbor		
Vietnam Veterans of America		
Private Individual (Client to Designate Locations)		
Manchester, MA.	lMark	
Sell (Consign/Estate Sale/Tag S	ale)	
Consign-it		
Estate Treasures of Greenwich		
Storage		
Bob's L∕T boatsyard		
Westy's		

The DESTINATION function allows you to be very specific about where inventoried items will end up. You can elect any number of destinations, charitable organizations, family members, religious institutions, consignment shops, storage or other options, customizing your choices to fit yours and your family's interests and needs. You just populate the simple fields with names and addresses. From there it's just pointing and clicking on each item in the inventory and destination. When you indicate your option, Turning Point will follow through and execute your choice at the appropriate time in response to your direction.

# **Destination**





Welcome, John Sample! 7/27/2009

John Sample
Home Page / Messages
Add/Post Message
Activity Log
Inventory
Destinations
Search
Print All (Detail)
John Sample Admin

Inventory w/o Destination Assigned

Add/View Destinations

Add Users

Logout/Login

#### **Add New Destination**

Destination Type:	Select One ▼
Destination name:	
Contact name:	
Organization name:	
Address1:	
Address2:	
City:	
State:	
Zip:	
Phone:	
Destination notes:	
	Insert record

# **General Contracting**









As licensed general contractors, we'll make sure all of your property-management needs are being met, We will supervise and coordinate repairs, renovations, painting, landscaping, house cleaning, window washing, or whatever needs to be done to ensure a successful presentation. No matter where you live, you will know the work, or required maintenance is being completed efficiently and to your satisfaction. All significant work performed is photographed and available for your review on our web site.

# Single Point of Contact





Our goal is to make this transitional period as easy as possible for you and other vested parties. In addition to all of the property maintenance, inventory control and general contracting, we will work tirelessly on your behalf to show the property, represent your interests and bring closure to this life event.

# Closure





You will be directly involved and able to easily track every critical step from the comfort of your home, office or wherever you have Internet access. Through this innovative on-line tool, and thanks to our experienced and skilled property-management and real estate sales team, you can trust Turning Point to understand your needs and exceed your expectations at every turn!