

ACPConnect – Quick Search Tips

As easy as 1 - 2 - 3!

1. Enter Your Search Criteria

After logging into ACPConnect, you may initiate a search from any page by typing your search criteria into the search box (top right on navigation bar) and clicking the magnifying glass icon (or press enter).

Alliance of Comprehensive Planners	¥r fin ⊠	
Communities - Find A Member Events - Network - Resources - Searching ACPConnect -	search Q	
A LATEST DISCUSSIONS Hubly - Why Scaling Your Firm Has More To Do With Your	ACP Partners	
Posted in <u>Beard Community Cafe</u> If you missed the webinar from Hubly on July 13, 2022, you can watch a copy of the recording in the		
Advice needed concerning successor trustee/attorney-in-fact By: <u>Steven Clark, CFP8, EA</u> , 17 hours ago Posted in: <u>Mambar2Mambar</u>	^{Complete List} ₩Member Spotlight	

Search Criteria Tips: Use these common operators when typing your terms into the search box to narrow results and find more relevant content (note: operators MUST be capitalized):

- **Quotes**: Use quotes to search for an exact phrase.
 - Ex: "Estate Attorney"
- AND/OR: Include two search terms.
 - Ex: Estate Attorney AND Southern California
 - Ex: "Estate Attorney" OR "Estate Planning"
- **Parentheses**: Combine operators to create a more complex search.
 - Ex: Estate Attorney AND (California OR Arizona)
- Asterisks: Use as a root word/stem/truncation search.
 - Ex: comply*

This will return posts that contain the words comply, compliance, complying, etc.

2. Filter Your Results

Your search results are sorted by "Relevance" by default. You may change setting to filter by "Most Recent or "Least Recent" in the dropdown on the right.

Look under the "All Content" heading on the left to see content categories as well as "More Filters".

Communities - Find A Member	Events • Network • Resources • Searching ACPConnect •	search Q
Search		
	Estate Attorney AND (Carolina OR Arizona)	٩
All Content 99	99 results found for "Estate Attorney AND (Carolina OR Arizona)"	Sort By: Relevance 🗸
 Blogs 1 Discussion Threads 24 Library Entries 74 	Arizona Estate Planning attorney. See matching posts in thread - Arizona Estate PlanningClie	Discussion Thread 3 Jim Davis, <u>CFP9, EA</u> Added 07-27-2011 <u>View Community</u>
More Filters Community Comments	Seeking North Carolina Estate Attorney. See matching posts in thread - Seeking North Carolina Estate	Discussion Thread 1 Patricia Konetzny, CPPe EA Added 07-19-2011 View Community
> Created	Arizona Business Attorney See matching posts in thread - Arizona Business Attorn	Discussion Thread 2 Jackie Kleinman Added 02-27-2012 View Community

Click on a content category (for example, "Discussion Threads") to see additional filter options including "Community" and "Author".

	Estate Attorney AND (California OR Arizona)			Q
All Content 257	93 results found for "Estate Attorney AND (California OR Arizona)" with filters applied		Sort By: Relevance	~
 Bloos 1 Discussion Threads 93 Environ 	Arizona Estate Planning attorney. See matching posts in thread - Arizona Estate PlanningClie	Discussion Thread 3	Jim Davis, CFP®_EA Added 07-27-2011 View Community	
More Filters Content Type	Arizona Business Attorney.	Discussion Thread 2	Added 02-27-2012 View Community	
 Community wember2member (87) ACP - Nor Cal Study Group (2) Compliance Q&A Forum (2) Board Community Cafe (1) 	Estate Attorney Referral - Southern California	Discussion Thread 1	Added 01-17-2013 View Community	
 Special Projects Committee (1) Author Katineen Dollard, CFP®, EA, MBA (7) 	California Eldercare attorney. See matching posts in thread - California Eldercare at	Discussion Thread 3	Colin Fraser. CFP®_EA Added 11-22-2019 View Community.	
 Michael Garber, CFP® (7) Chris Wentzien, CFP®, CPA/PFS, CPA, MBA (5) William Cuthbertson, CFP®, EA, MBA (4) 	Shared Equity Financing in California, real estate attorney, sought See matching posts in thread - Shared Equity Financing in California	Discussion Thread 2	Added 12-17-2015	

3. Access the Post or File

Click on any search result to access the post or file.

Arizona Estat	e Planning attorney	
Ndd a tag		
Sim Davis, Client in Phot	CFP®, EA 07-27-2011 12:46 PM enix area needs an estate planning attorney to handle simple will, HCPOAs, etc. Thank	
1. Arizona Estate Pla	anning attorney	0 Like
Jim Davis. CFP®. EA	Posted 07-27-2011 12:46 PM Client in Phoenix area needs an estate planning attorney to handle simple will, HCPOAs, etc. Thanks so muchjim James Davis, CFP®, EA Partnership Financial LLC Columbus, OH (614) 539-3308	Reply +
2. RE:Arizona Est	ate Planning attorney	0 Like
	Posted 07-27-2011 02:56 PM I use Jack Hough (he also has a son and daughter in the practice). He is located East of Phoenix in Mesa (480) 396-4949	Reply -

Need Help?

Contact ACP at 910.769.1569