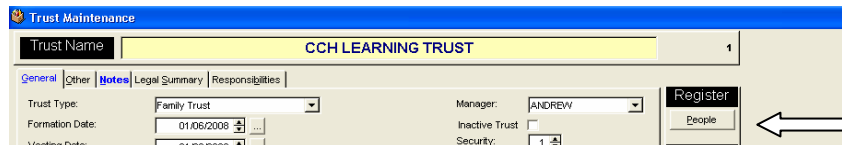


TRUST SERVICE TRAINING - LEVEL 1

SESSION 1.2

ADDING PEOPLE

Select People



Trust Maintenance

Trust Name: CCH LEARNING TRUST

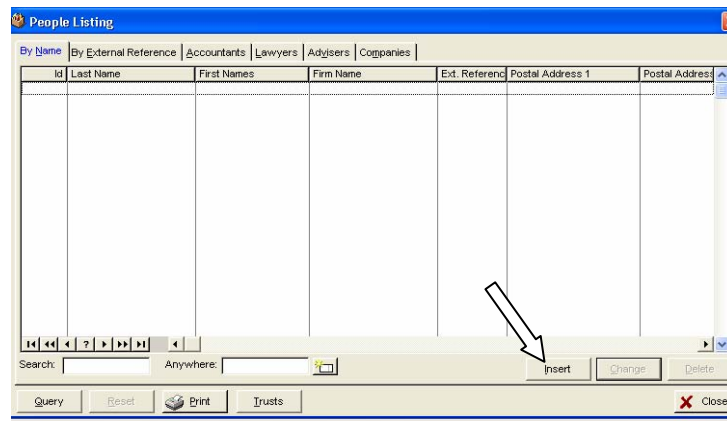
General | Other | Notes | Legal Summary | Responsibilities

Trust Type: Family Trust | Manager: ANDREW

Formation Date: 01/06/2008 | Inactive Trust: | Security: 1

Register | People

Select Insert/Person



People Listing

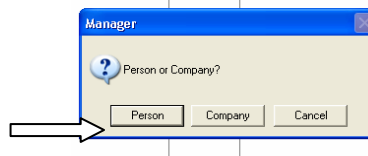
By Name | By External Reference | Accountants | Lawyers | Advisers | Companies

Id	Last Name	First Names	Firm Name	Ext. Reference	Postal Address 1	Postal Address 2

Search: Anywhere:

Insert | Change | Delete

Query | Reset | Print | Trusts | Close

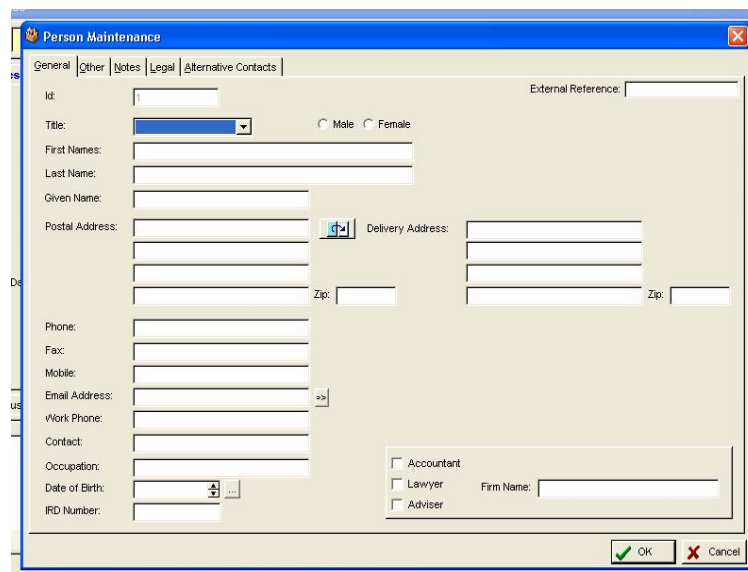


Manager

Person or Company?

Person | Company | Cancel

Opens People Screen



Person Maintenance

General | Other | Notes | Legal | Alternative Contacts

Id: | External Reference:

Title: | Male Female

First Names:

Last Name:

Given Name:

Postal Address: | Delivery Address:

Zip: | Zip:

Phone:

Fax:

Mobile:

Email Address:

Work Phone:

Contact:

Occupation:

Date of Birth:

IRD Number:

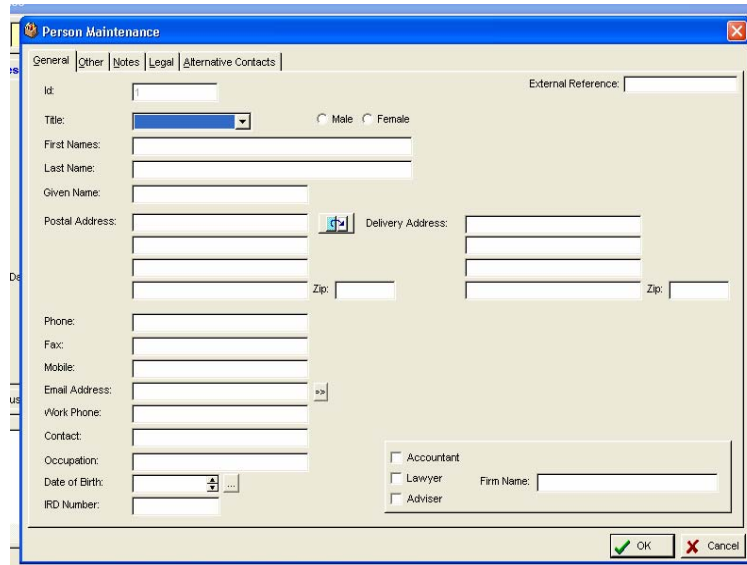
Accountant
 Lawyer
 Adviser

Firm Name:

OK | Cancel

GENERAL

Complete all required fields

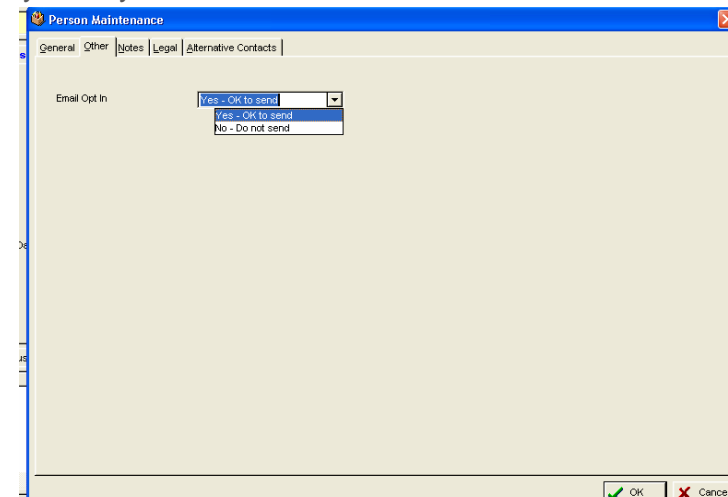


Note: You may have a link to Lawbase or MYOB. This will allow you to import client details directly. If you do not have this feature but would like to discuss it please contact your Account Manager for more details

Actions Point: Are there any additional titles you require, for example Sir, Lord or Lady. If so, note them down and we will cover how to set these up in Level 2

OTHER TAB

Complete any fields you may have on the 'Other Tab

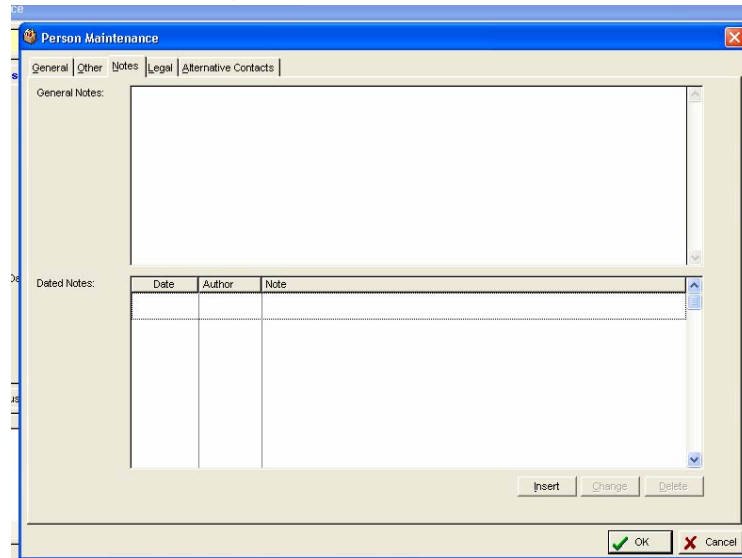


Note: Any additional fields you find under the Other tab are unique to your company and can be set up as required. This will be covered in Level 2. If you have no additional fields the Other tab will not be present.

Action Point: Is there any other information you would like to capture? Make a note of anything you might need

NOTES

You can add a dated note here if required.



Date	Author	Note

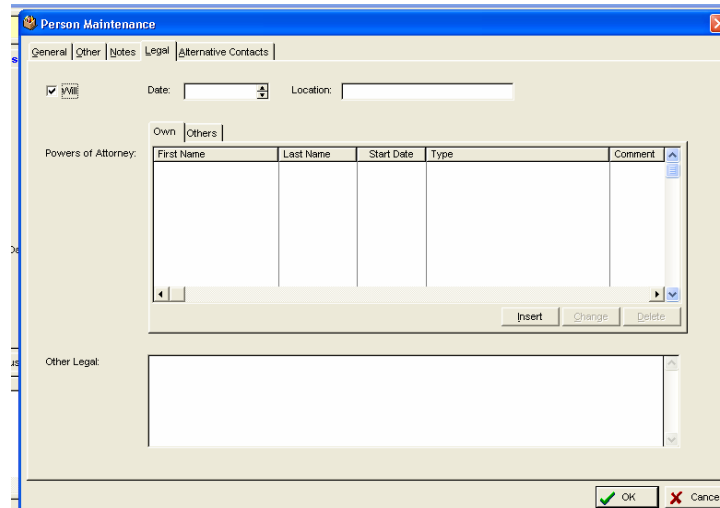
Select Insert, Select Manager, then type note as required

LEGAL

Check box for Will (if required) & complete details. Date & location do not appear until Will is checked

Select Insert to add Power of Attorney. Complete details

Type any further information into Other Legal



Will Date: Location:

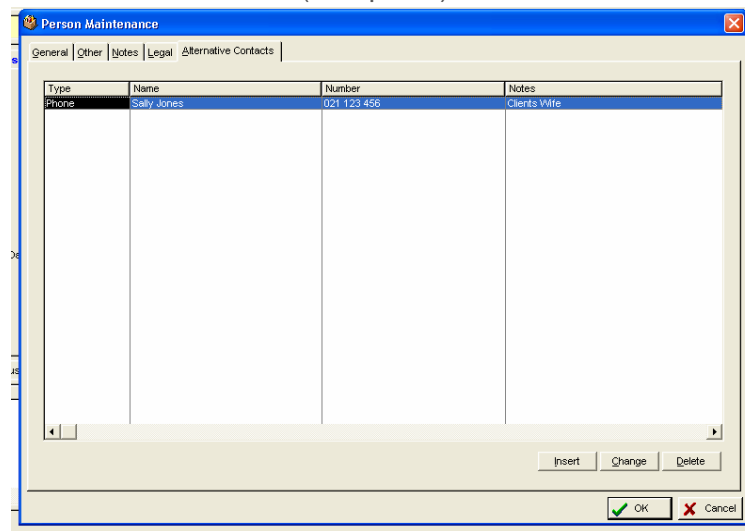
Own Others

First Name	Last Name	Start Date	Type	Comment

Other Legal:

ALTERNATIVE CONTACT

Select Insert to add an Alternate Contact (if required)



CLICK OK TO SAVE

