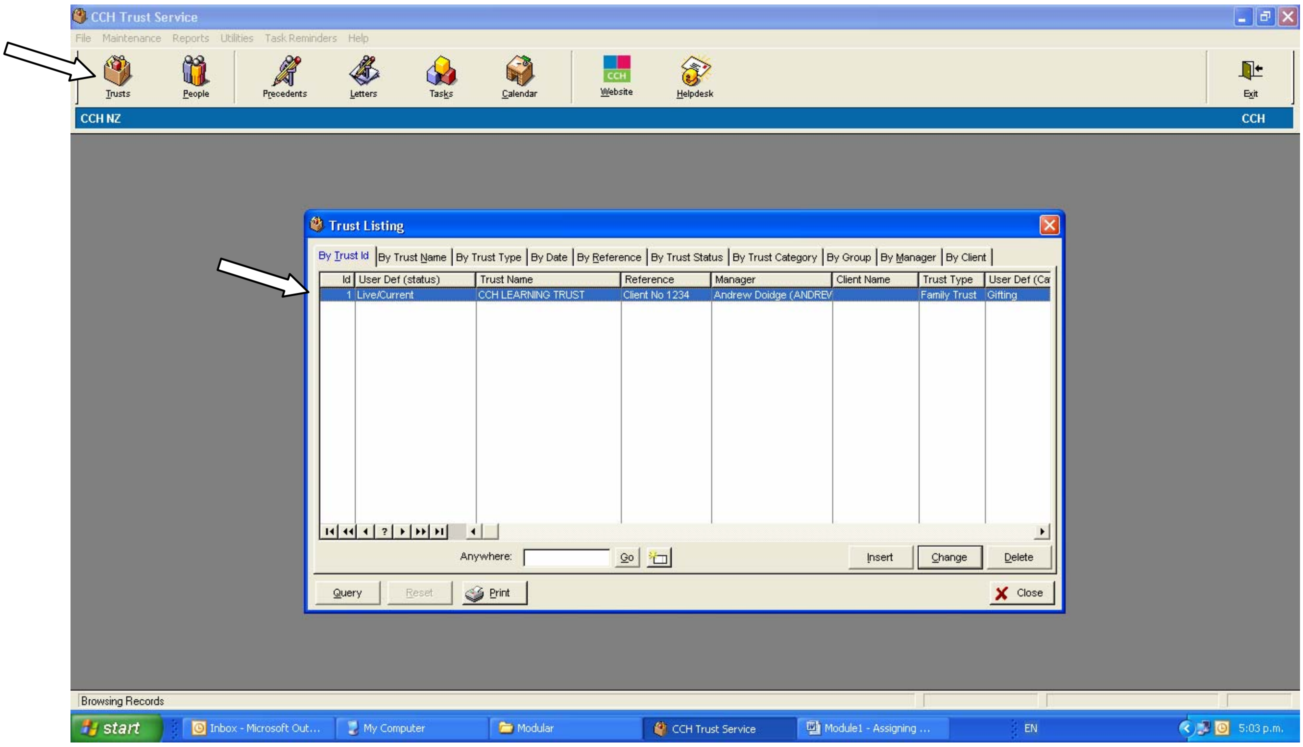
TRUST SERVICE TRAINING – LEVEL 1
SESSION 1.4

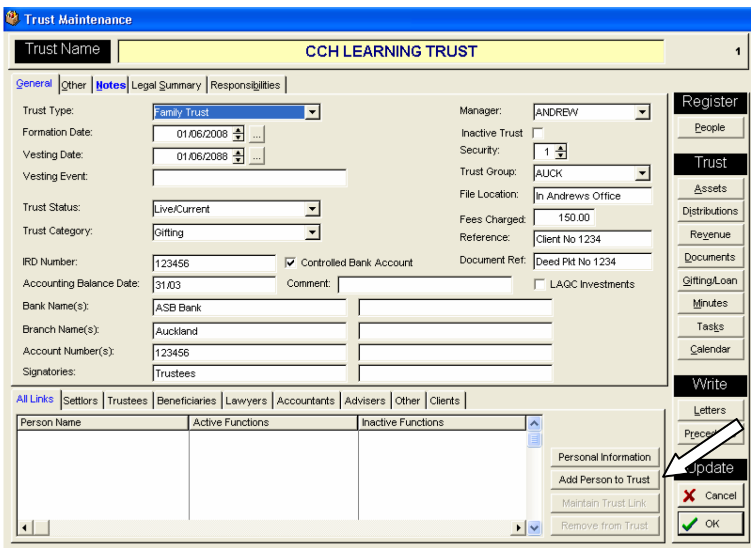
ASSINGING ROLES WITHIN THE TRUST

Note: Before Assigning Roles ensure all Trust information is complete and all People & Companies related to the Trust have been added

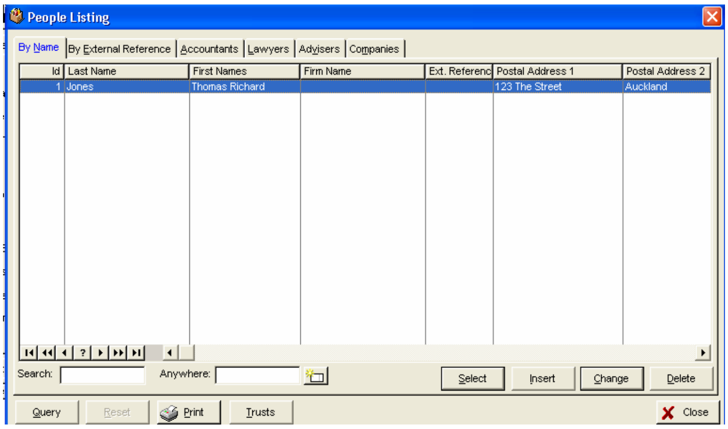
Select Trust Shortcut, then select Trust from List (double click or select Change)



Select **Add Person to Trust**

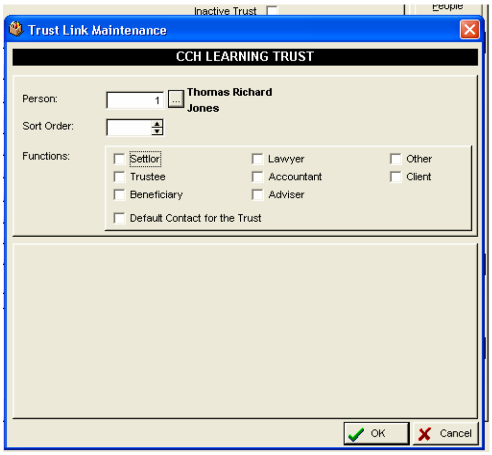


Select **Person** from List (double click or highlight and hit Select)



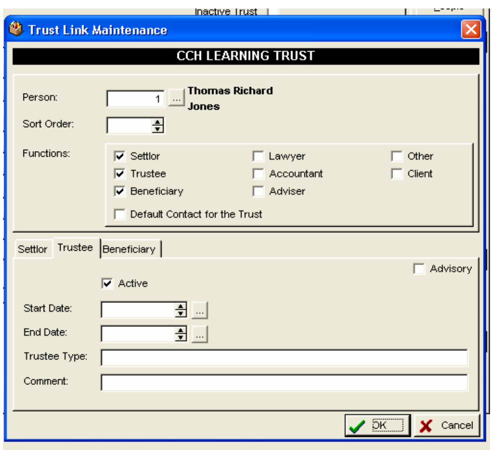
Note: You can use the search function at the bottom left

Select the **Role(s)** this person is to play in the Trust



Note: Sort order allows you to chose who appears first when creating documents that contain lists of people

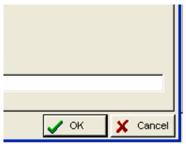
Complete Tabs (1x per role)



Add Start Date, End Date & Comments. Select Active or Inactive

Action Point: If you intend to use mailmerge to create client letters it is a good idea to check the Client box.

CLICK OK TO SAVE

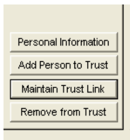


MAINTAINING RECORDS

Use **Personal Information** to view or edit Person/Company information

Use **Maintain Trust Link** to amend Roles within the Trust – it is advisable to make a Role Inactive (uncheck the active box) rather than remove the person from the Trust entirely

Use **Remove from Trust** to remove a Person/Company from that Trust permanently. No record will be kept of them ever having been involved so consider using Inactive function if appropriate



CLICK OK TO SAVE