

# TRUST SERVICE TRAINING - LEVEL 1

## SESSION 1 - REVIEW

### REVIEW

In this session we learned how to:-

- ⇒ Add a New Trust
- ⇒ Add a New Person Record
- ⇒ Add a New Company Record
- ⇒ Link People & Companies to the Trust Record
- ⇒ Assign Roles to People & Companies within the Trust Record
- ⇒ Maintain Trust, People & Company Records

### Action Points

Question	✓	Session Required	Date
Do I need to add or amend any Trust Types?		Session 6	23/10/08
Do I need to add or amend any Trust Status's?		Session 6	23/10/08
Do I need to add or amend any Trust Categories?		Session 6	23/10/08
Do I need to add or amend any Managers?		Session 5	09/10/08
Do I need to use the Trust Group feature (Advanced Security)?		Session 5	09/10/08
Do I need any additional fields in the Trust Service to record information that there is not already a space for?		Session 6	23/10/08
Do I need to amend any of the field names in the Legal Summary?		Session 6	23/10/08
Do I need to use the 'Responsibilities' function?		Session 5	09/10/08
Do I need to agree a policy for the use of File Location, Fees Charged & references?		Internal discussion	
Do I want to import information from Lawbase or MYOB?		Discuss with CCH	
Do I need to capture any additional information on the people record?		Session 6	23/10/08
Do I need to review & tidy up any of my data?		Internal discussion	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	