

TRUST SERVICE TRAINING - LEVEL 1

SESSION 3

OVERVIEW

In this session we will learn how to:-

- ⇒ Add a Gifting Account to a Trust
- ⇒ Add an Acknowledgement of Debt to a Gifting Account
- ⇒ Add a Gift to a Gifting Account
- ⇒ Duplicate Gifting where there are multiple Settlers
- ⇒ Use the Sub Groups
- ⇒ Print the Gifting Account
- ⇒ Create Gifting Documents using the Gifting Wizard
- ⇒ Use Assets, Revenues & Distributions

Prerequisites for Level 1, Session 3

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are comfortable using a PC, Windows Software and have used the Trust Service previously
- ⇒ You have at least 1 Trust entered onto your database
- ⇒ You understand the concept of Gifting and what it means to your Trusts

Preparation for Level 1, Session 3

- ⇒ Print the Session Notes
- ⇒ Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- ⇒ Dial into the Meeting, using the Link & Password provided 5mins prior to start time