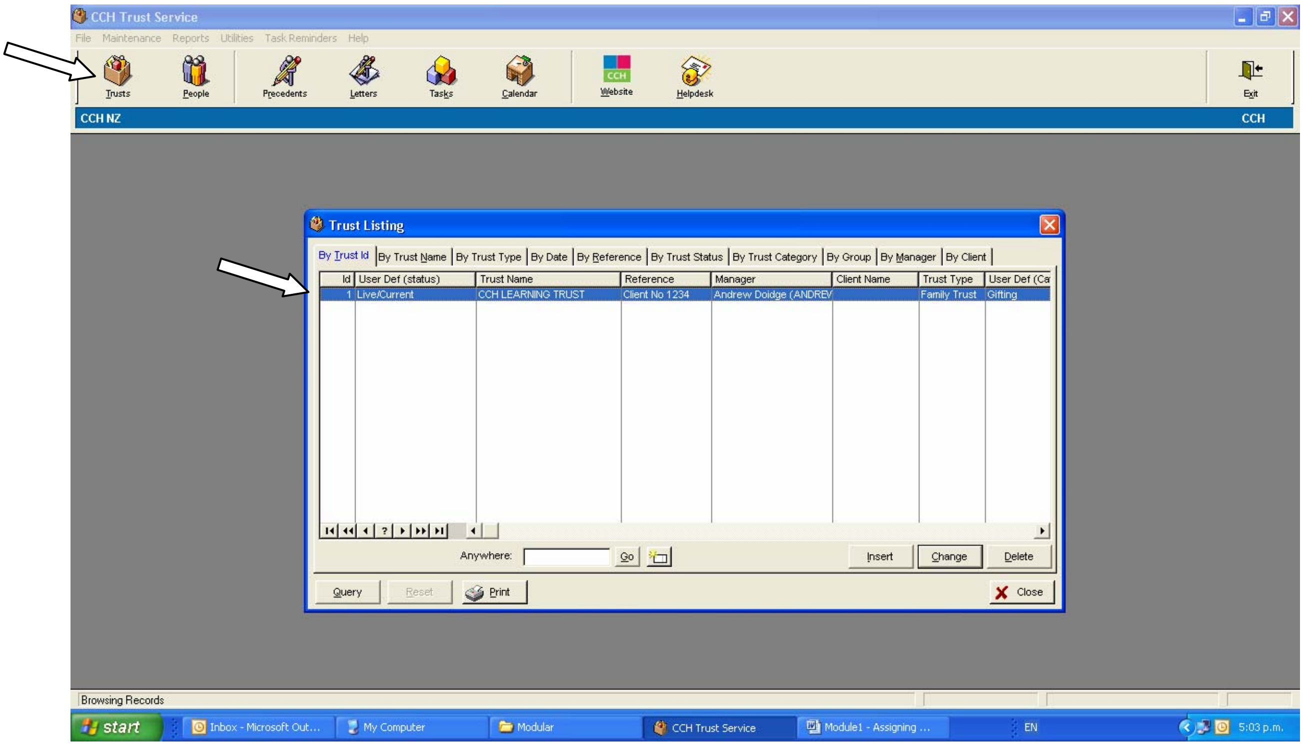
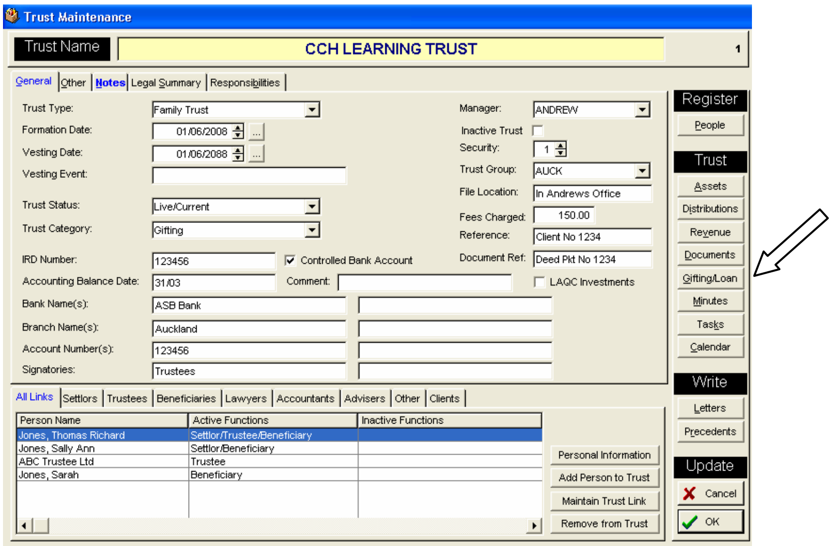
TRUST SERVICE TRAINING - LEVEL 1 SESSION 3.1

ADDING A GIFTING ACCOUNT

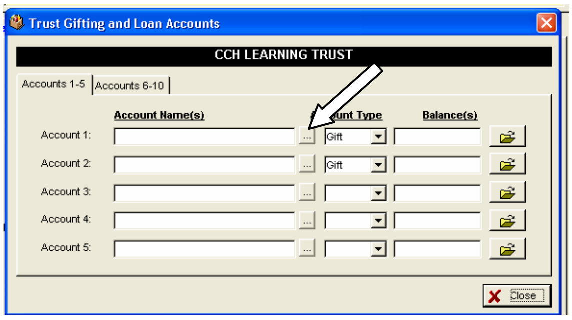
Select **Trust Shortcut**, then select **Trust** from List (double click or select Change)



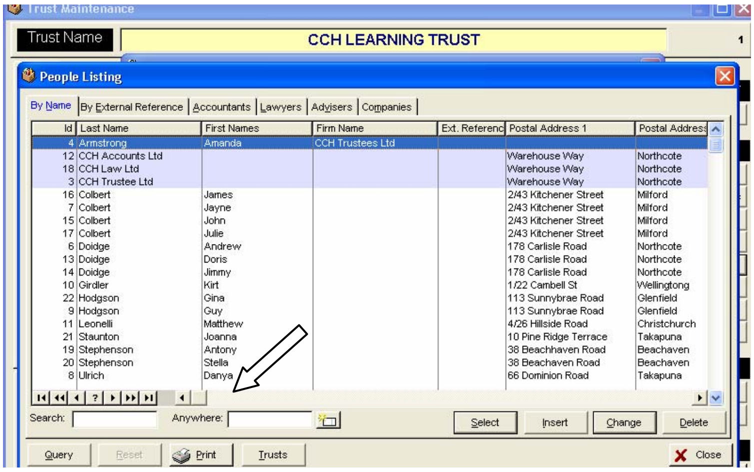
Select **Gifting/Loan** from Right Hand Menu to open the **Gifting Account**



This opens the **Gifting & Loan Accounts** screen. You can have upto 10 accounts per Trust, 1 account is created per Settlor.

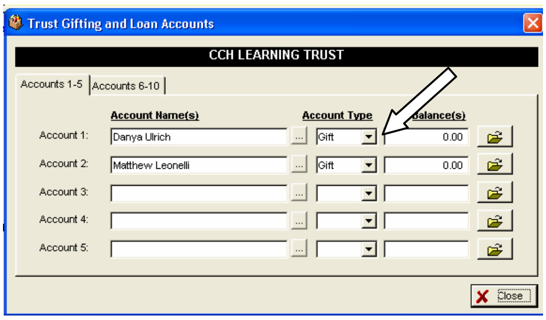


Select the small square at the end of **Account 1** to bring up the **People** listing. Select the name of the 1st **Settlor** from this list

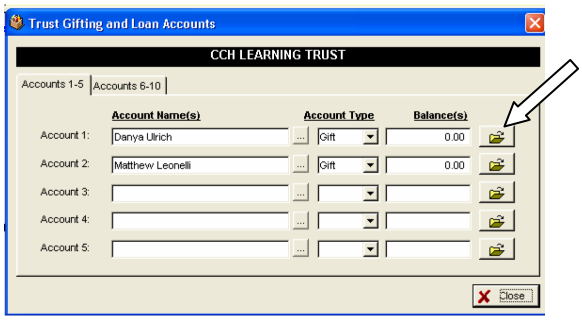


Repeat this process if there is more than 1 Settlor.

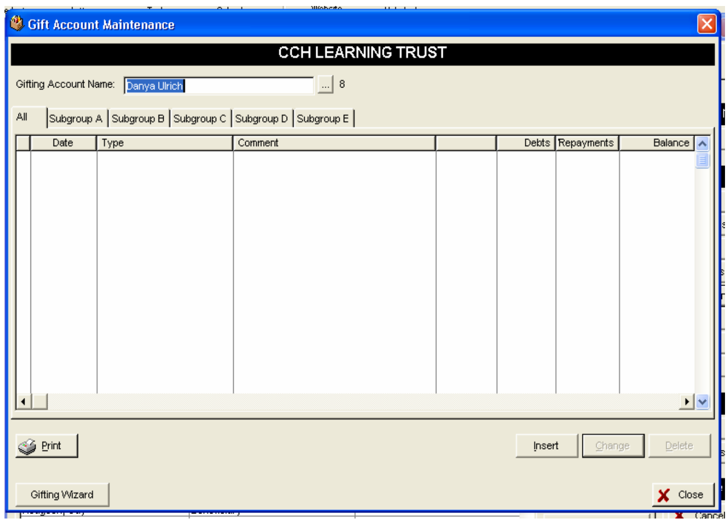
Use the arrow next to Account Type to select **Gift** account



Open the Gift Account by selecting the **Folder** icon



You should now see an empty Gift Account



Your Gift Account is set up and ready to use