

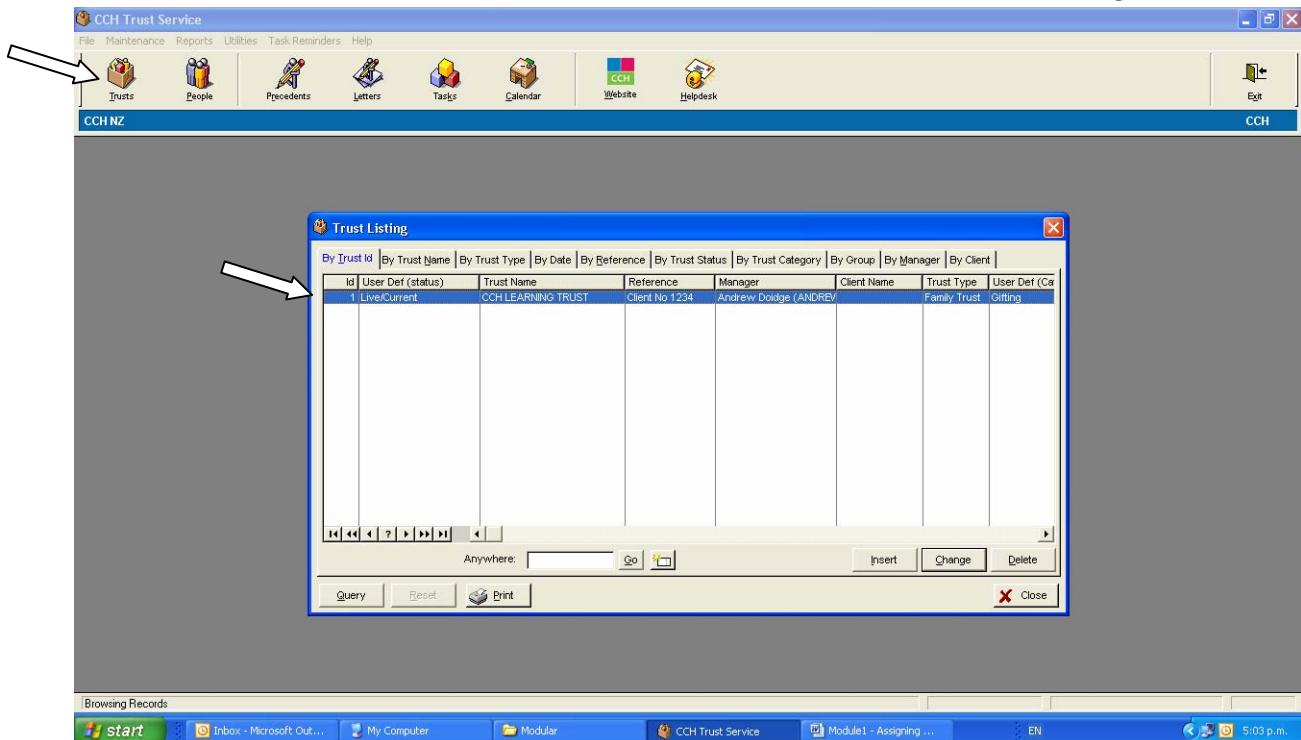
TRUST SERVICE TRAINING - LEVEL 1

SESSION 3.3

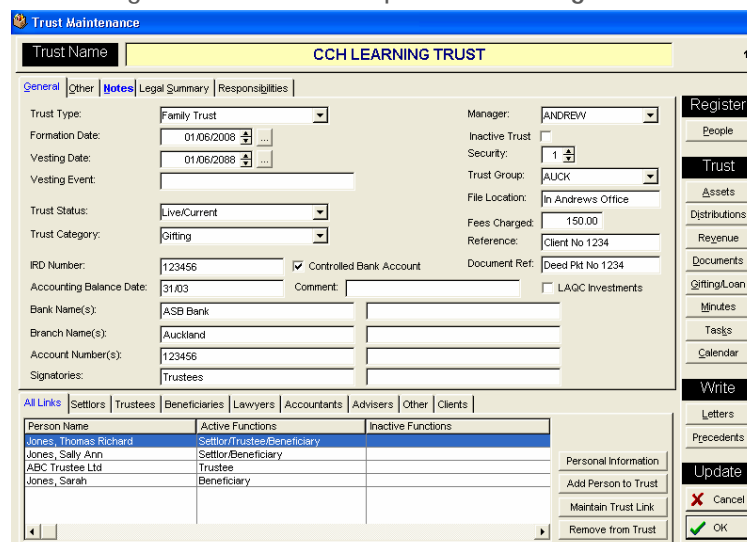
DUPLICATING POSTINGS TO MULTIPLE SETTLORS

You should have already created your Gift Account as per Session 3.1

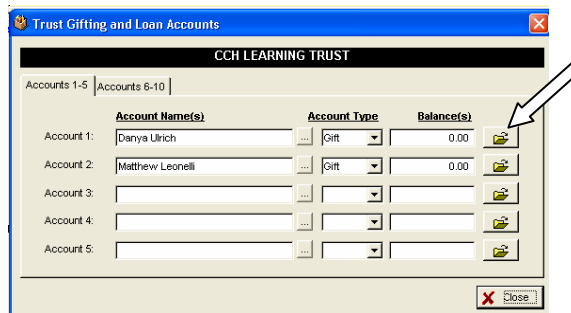
Select Trust Shortcut, then select Trust from List (double click or select Change)



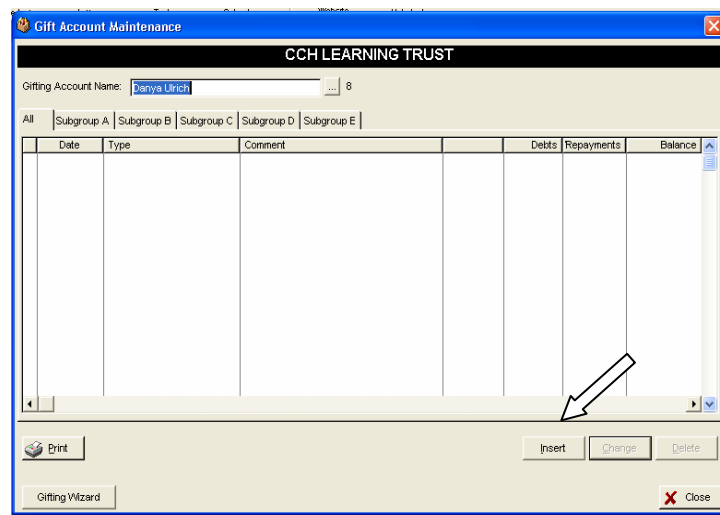
Select Gifting/Loan from Right Hand Menu to open the Gifting Account



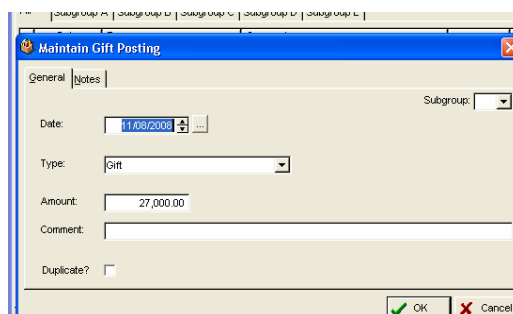
Open the Gift Account by selecting the Folder icon



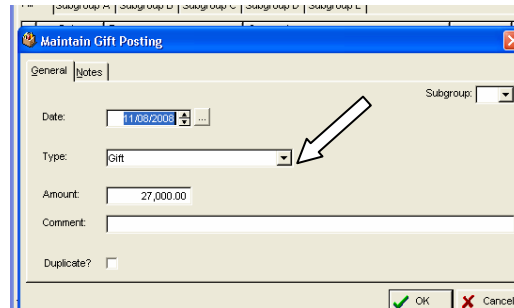
Select Insert



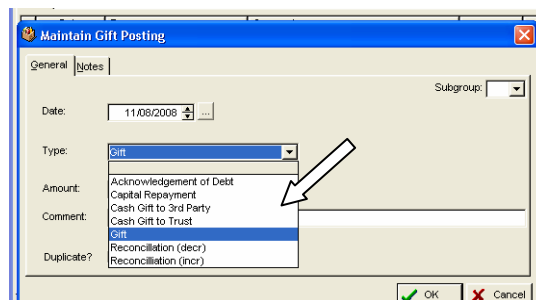
This opens the Maintain Gift Posting screen



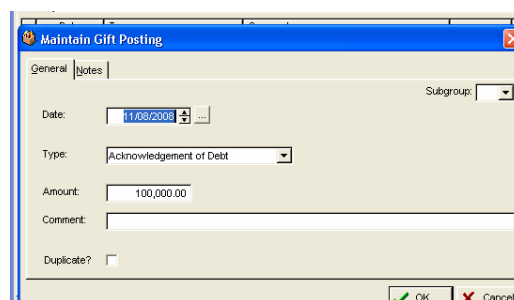
Type or Select the date of the Posting
 Select the arrow next to Gift Type.



Select the Type of posting you wish to make.

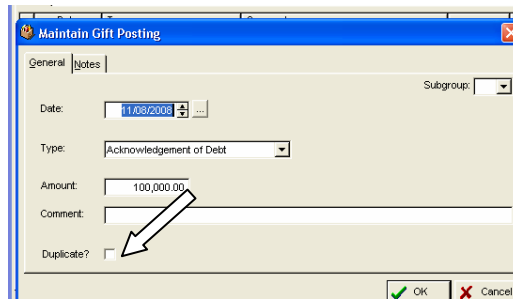


Type the **Amount** of the posting and any other comment you might want to make. You may also wish to select the **Notes** tab and make further notes on the posting



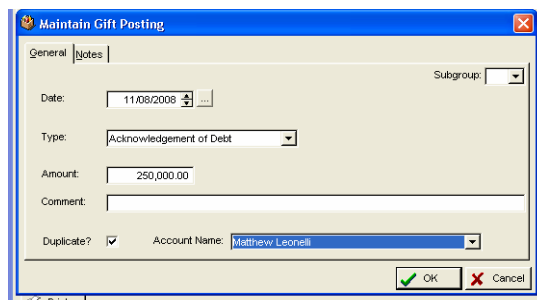
Note: If the Total Acknowledgement of Debt is \$500,000 and this is to be split between 2 Settlers, type half of the amount, e.g \$250,000 each

Select Duplicate



Maintain Gift Posting
 General | Notes | Subgroup: [v]
 Date: 11/08/2008
 Type: Acknowledgement of Debt
 Amount: 100,000.00
 Comment:
 Duplicate?

You will now see a drop down list showing the names of the other Settlor. Select the Settlor you wish to duplicate this posting to.

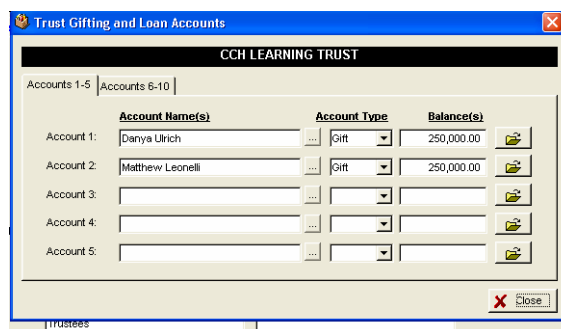


Maintain Gift Posting
 General | Notes | Subgroup: [v]
 Date: 11/08/2008
 Type: Acknowledgement of Debt
 Amount: 250,000.00
 Comment:
 Duplicate? Account Name: Matthew Leonelli

Note: If you do not see a 2nd Account Name you may not have created that Account correctly. Return to the Gifting & Loan Account Screen (first picture, page 2) and check you have 2 Accounts set up

Select OK to Save

You now have an Acknowledgement of Debt for \$250,000 on each account



Trust Gifting and Loan Accounts
CCH LEARNING TRUST

Account Name(s)	Account Type	Balance(s)
Account 1: Danya Ulrich	Gift	250,000.00
Account 2: Matthew Leonelli	Gift	250,000.00
Account 3:		
Account 4:		
Account 5:		

Note: When duplicating the Gifting do not split the amount, each account should have \$27,000 each

Ongoing gifting can be duplicated in this way to half the workload and keep both balances in line.