

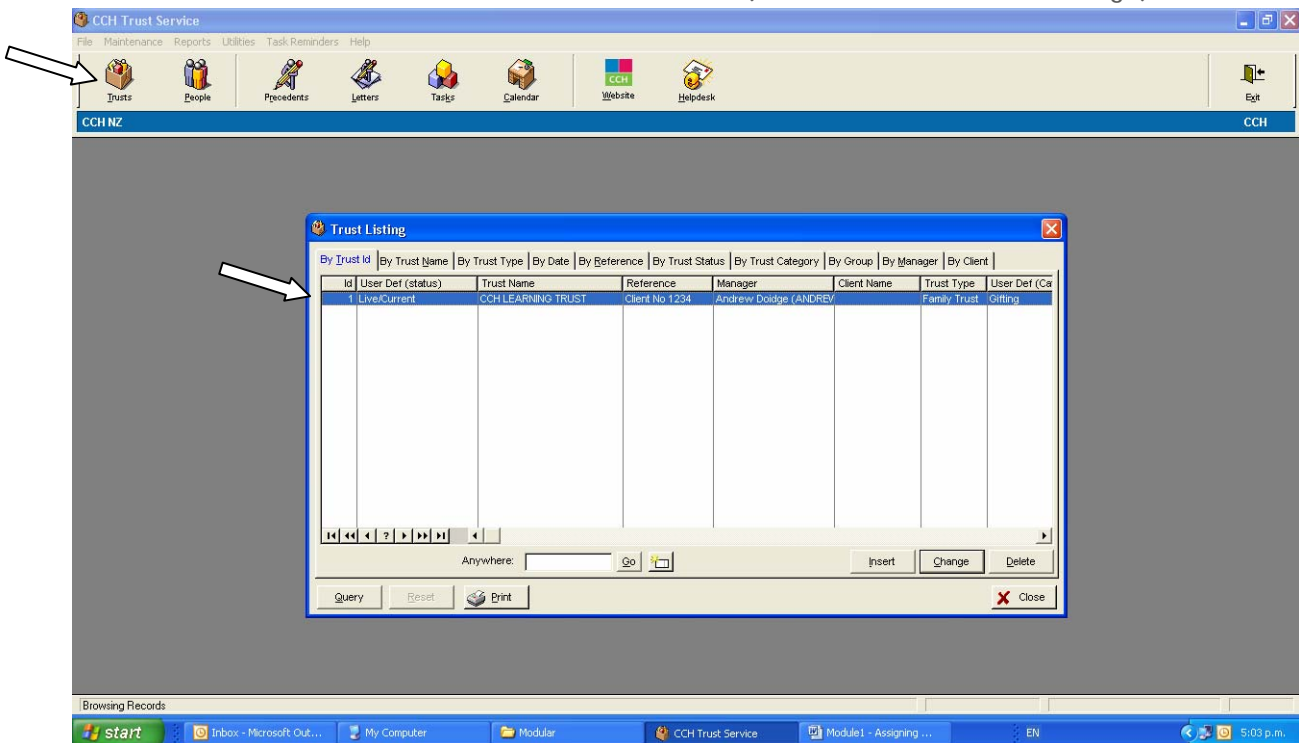
TRUST SERVICE TRAINING - LEVEL 1

SESSION 3.5

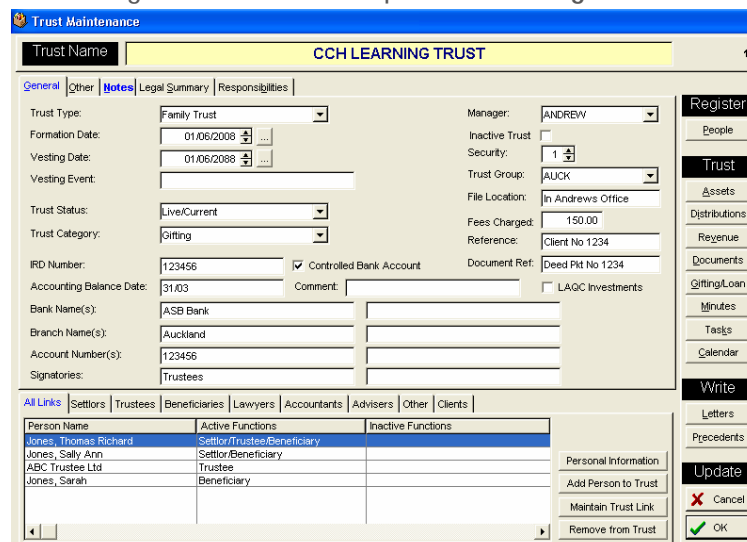
PRINTING A GIFTING ACCOUNT STATEMENT

You should have already created your Gift Account as per Session 3.1 & entered some postings as per 3.2 - 3.4

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

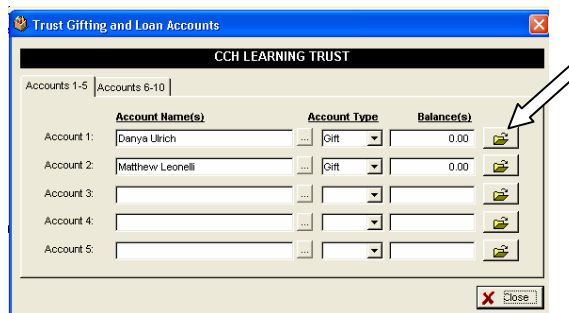


Select Gifting/Loan from Right Hand Menu to open the Gifting Account

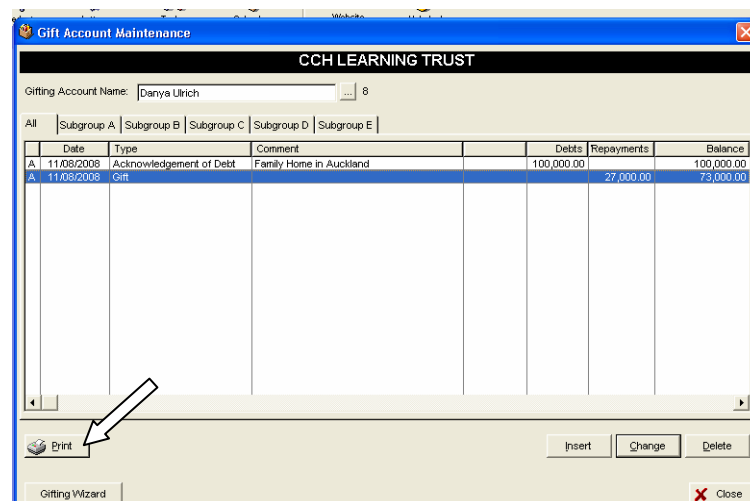


Person Name	Active Functions	Inactive Functions
Jones, Thomas Richard	Settlor/Trustee/Beneficiary	
Jones, Sally Ann	Settlor/Beneficiary	
ABC Trustee Ltd	Trustee	
Jones, Sarah	Beneficiary	

Open the Gift Account by selecting the Folder icon



Select Print



A statement will be printed to screen. This can be sent to the printer or written to a PDF document (useful if you need to email the information)

