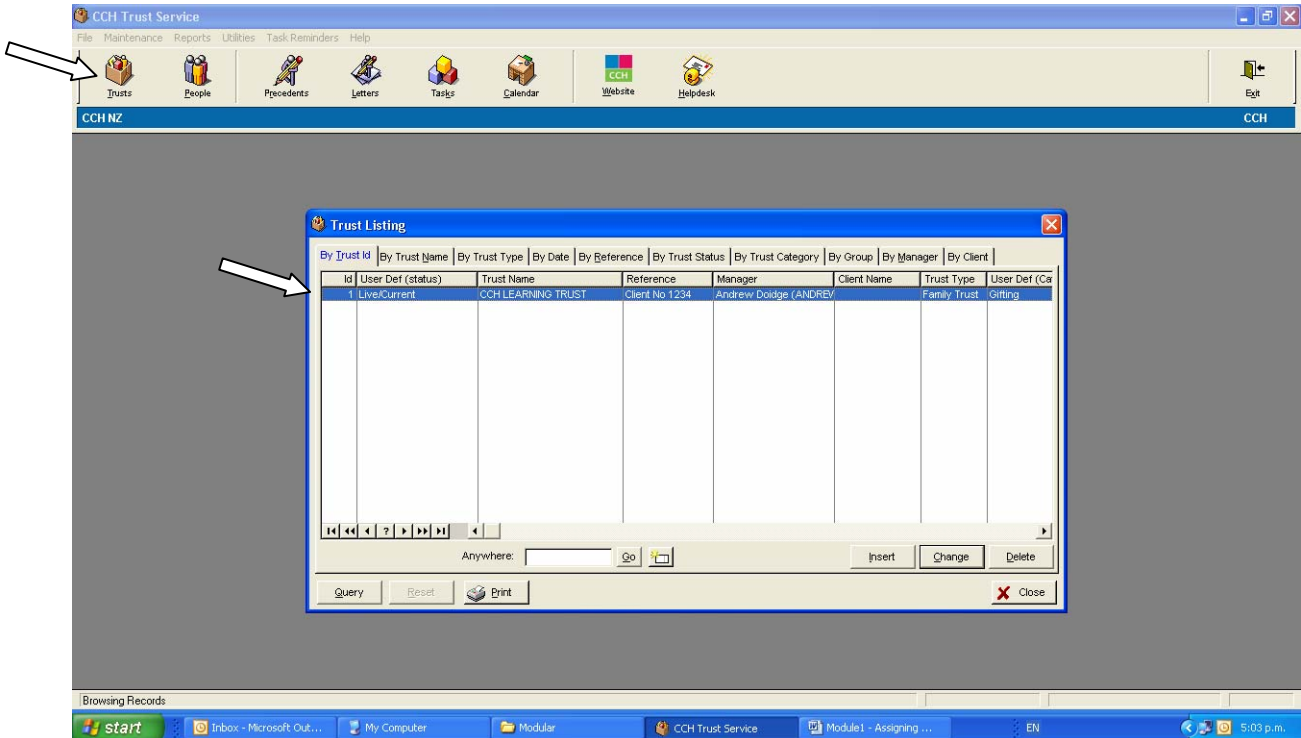


# TRUST SERVICE TRAINING - LEVEL 1

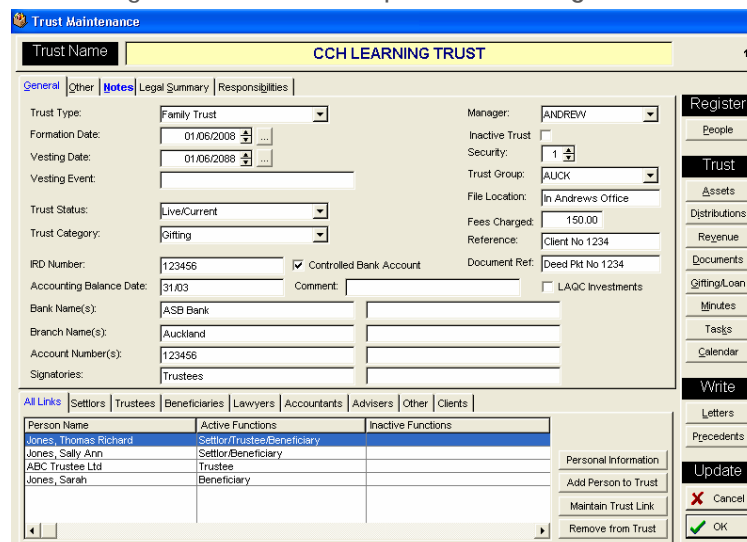
## SESSION 3.6

### CREATING GIFTING DOCUMENTS FROM THE GIFTING WIZARD

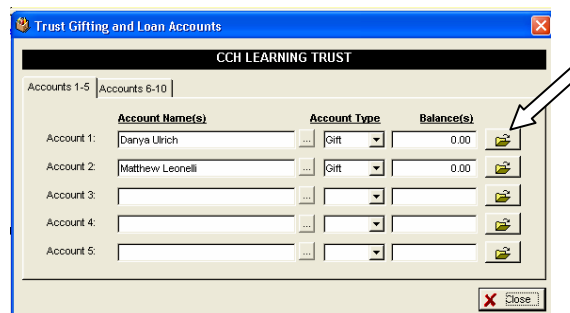
Select Trust Shortcut, then select Trust from List (double click or select Def Change)



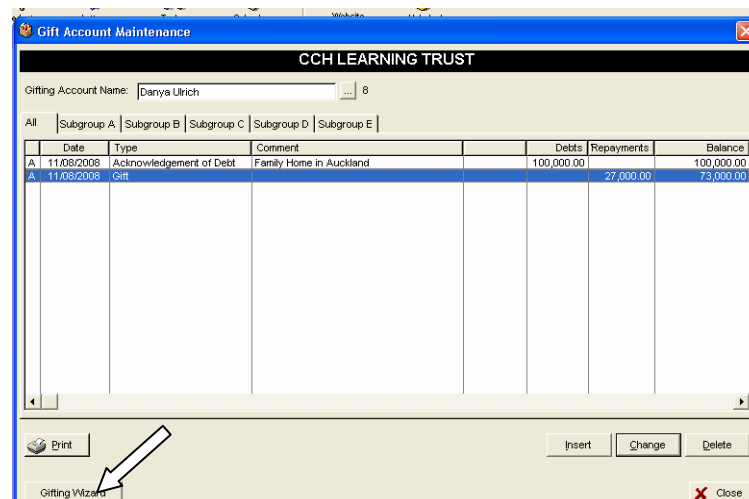
Select Gifting/Loan from Right Hand Menu to open the Gifting Account



Open the Gift Account by selecting the Folder icon

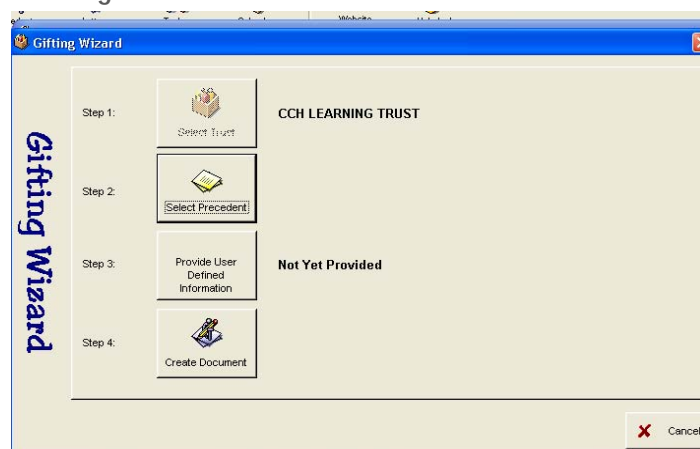


Select Gifting Wizard

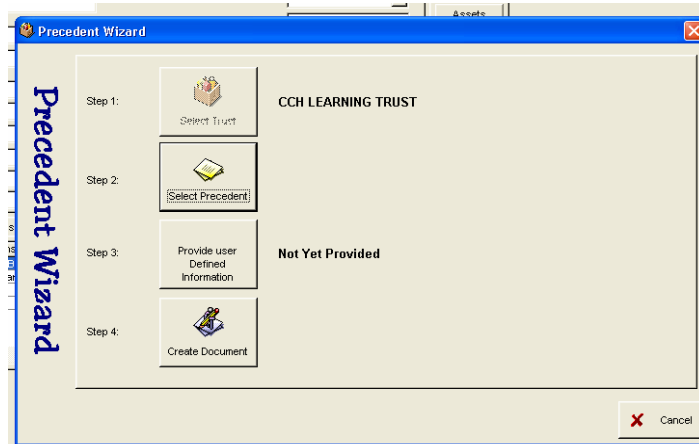


Note: You can access the Gifting Templates via the Precedent Wizard (Session 2.1) however, it is more effective go via the Gifting Account as you will be able to import more information & reduce additional typing

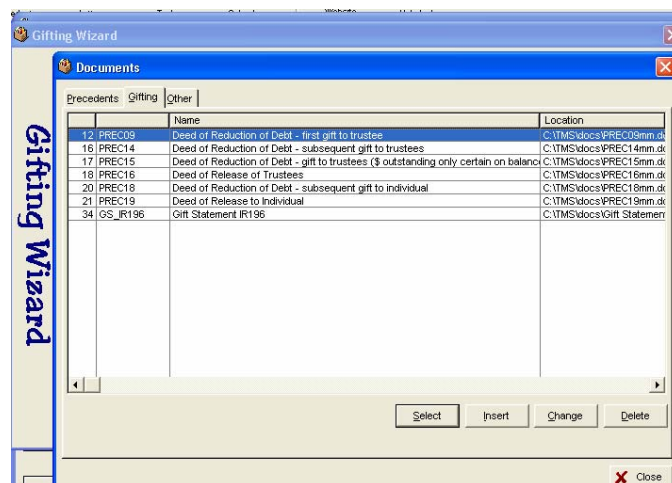
You will now see the Gifting Wizard



**Step 1 - Select Trust.** This will be completed for you if you access the Wizard correctly via the Gifting Account shortcut . If you have used the Shortcut from the top toolbar you will need to select the Trust



**Step 2 - Select Precedent**



Note: If the template you need is not on the gifting tab, try the Precedents tab

Action Point: There is a list of the Standard CCH Precedents attached. Check you have them all as it is possible for people to delete them in error. Contact Support if you find you has lost any and they will help you to restore them(0800 500 224)

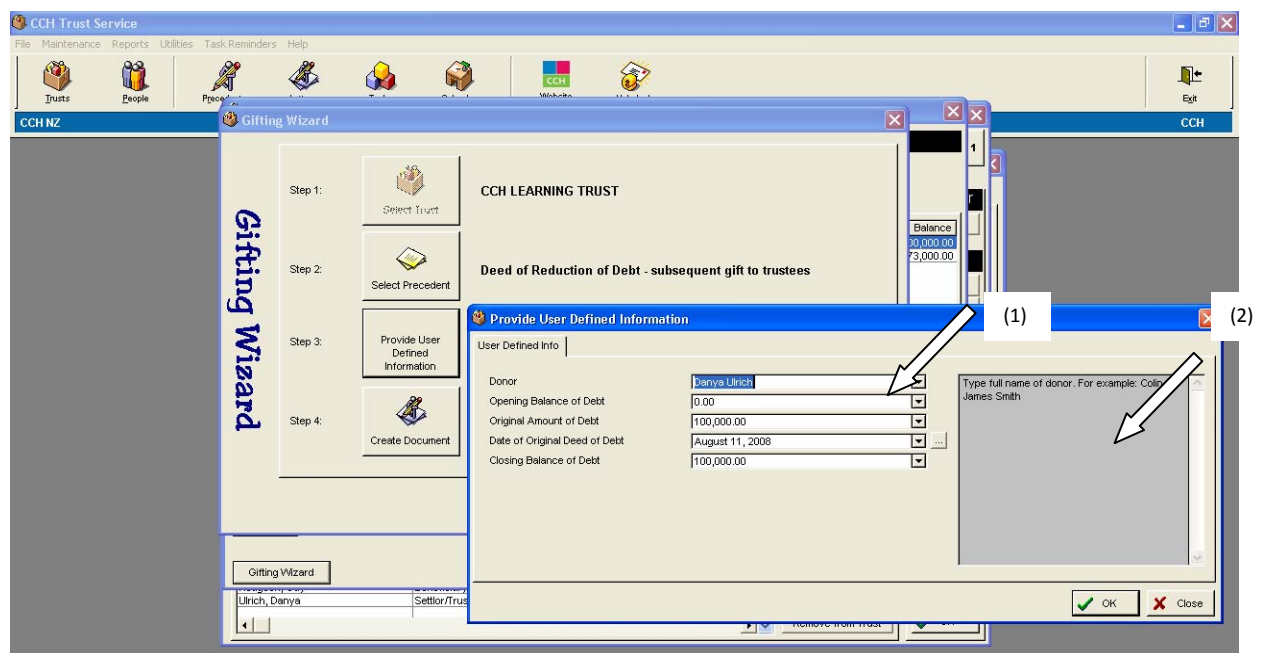
### Step 3 - Provide User Defined Information

This is your opportunity to pull through as much information as you can from the Trust Record.

Fields vary from document to document. If there is an arrow at the end of the box, click it to see your options to select from, for example, name of the donor (1)

If there are no option provided you will need to type the information into the box.

The Grey Box to the Right explains what information is required (2)



### Step 3 - Create Document

Document is created & may be given a temporary file name (depending on your individual settings). Word should automatically open up with your document.

This document is now a Word document like any other. Amendments can be made if required.

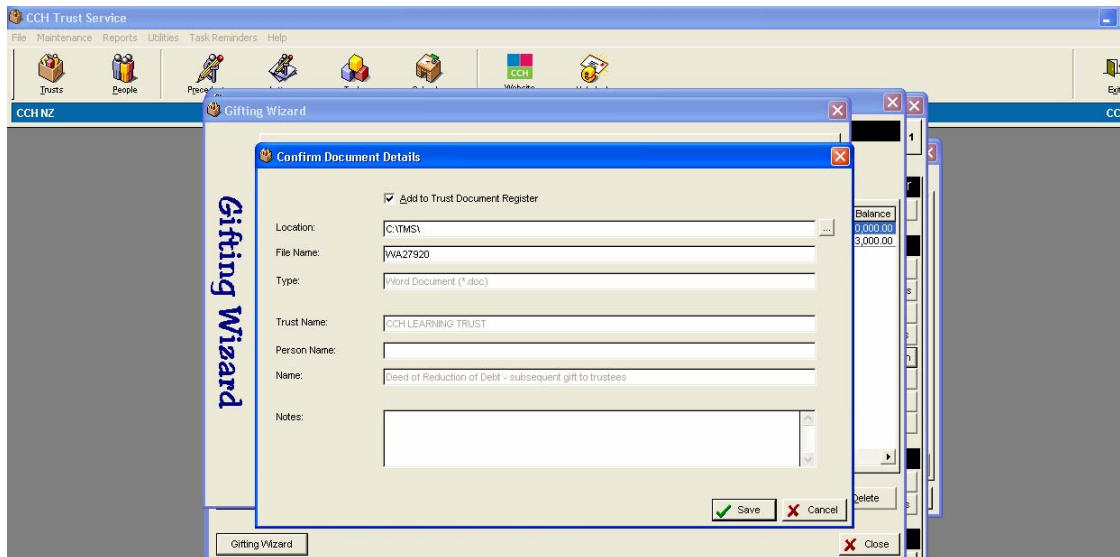
It can be saved to the location of your choice.

Action Point: Does word start up automatically? If you experience any problems contact Support on 0800 500 224

### Step 3 - Additional

You may see the **Confirm Document Details** Screen before your document is created. This is determined by your user settings. These will be covered in Session 5.

If you are using this setting, this is your opportunity to select where you store the document and what you name it prior to its creation.



Action Point: Will this help you to save your documents to a central location?

You have now created your document using the CCH Template

## Appendix 1

### List of Standard CCH Precedents

Code	Description	Tab
PREC01	Declaration of Trust - One principle family member	Precedents
PREC02	Declaration of Trust - Two principle family members	Precedents
PREC03	Deed of Trust - Single Settlor	Precedents
PREC04	Deed of Trust - Husband & Wife Settlor	Precedents
PREC05	Deed of Trust - Single Settlor & Two principle family members	Precedents
PREC06	Removed from CCH Trust Service	Removed
PREC07	Deed of Sale & Purchase & Acknowledgement of Debt	Precedents
PREC08	Deed of Acknowledgement of Debt	Precedents
PREC09	Deed of Reduction of Debt - First gift to Trustees	Gifting
PREC10	Memorandum of Guidance for Trustees	Precedents
PREC11	Will	Precedents
PREC12	Removed	Removed
PREC13	Removed	Removed
PREC14	Deed of Reduction of Debt - Subsequent gift to Trustees	Gifting
PREC15	Deed of Reduction of Debt - Gift to Trustees(\$ outstanding)	Gifting
PREC16	Deed of Release of Trustees	Gifting
PREC17	Deed of Reduction of Debt - First gift to Individual	Precedents
PREC18	Deed of Reduction of Debt - Subsequent gift to Individual	Gifting
PREC19	Deed of Release of Individual	Gifting
PREC20	Removed	Removed
PREC21	Removed	Removed
PREC22	Deed of Appointment of Trustees - Death of one Trustee	Precedents
PREC23	Deed of Appointment of Trustees - 1 ret, 1 apt, 1 cont	Precedents
PREC24	Deed of Appointment of Trustees - 1 ret, 1 apt, multi cont	Precedents
PREC25	Deed of Appointment of New Trustee of Estate - Death of one Trustee	Removed
PREC26	Deed of Appointment of New Trustee of Estate - All Trustees Retire	Precedents
PREC27	Deed of Appointment & Retire of Trustees - one Trustee cont	Precedents
PREC28	Relationship Property Agreement - Tenancy in common/joint	Precedents
PREC29	Relationship Property Agreement - Specific property to one partner	Precedents
PREC30	Relationship Property Agreement - Covering election on death & trusts	Precedents
PREC31	Removed	Removed
PREC32	Removed	Removed
PREC33	First Resolutions of Trustees	Precedents
PREC34	Minutes of First Meeting of Trustees	Precedents
PRECX40	Deed of Appointing Additional Discretionary Beneficiary	Precedents
PRECX41	Deed Removing Beneficiary	Precedents
GS_IR196	Gift Statement - IR196	Gifting
MIN01	Minute Document	Minutes
	Trust Review Form With Bookmarks	Other
	Trust Review Form	Other