

# TRUST SERVICE TRAINING - LEVEL 1

## SESSION 3.8

### REVIEW

In this session we learned 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

### Action Points & Follow Up

Question	✓	Session Required	Date
Do I have the additional posting types available in the Gifting Account? If not, do I need them		Session 6	23/10/08
Are we using the Gifting Accounts correctly & in the most efficient way		Discuss internally	
Are we creating the Gifting Documents from the Gifting Wizard (rather than the Precedent Wizard)		Discuss internally	
Do I need to review the session notes from 2.1 & 2.2? Download from <a href="http://www.cch.co.nz">www.cch.co.nz</a>		Download info	
Do I have all the standard document templates I should?		Call Support 0800 500 224	
Does Word start Automatically when I run the Gifting Wizard?		Call Support 0800 500 224	
Do we need to save our documents to a central location?		Session 5	11/09/08
Are we using the Assets, Revenues & Distributions Registers? Do we want/need to?		Discuss internally	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	