SESSION 2.0 LEVEL 1

Gifting Accounts & Documentation

In this session we will learn 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 Settlors
- Use the Sub Groups
- Print the Gifting Account
- Create Gifting Documents using the Gifting Wizard
- Use Assets, Revenues & Distributions

Prerequisites for Session 3

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- You are comfortable using a PC, Windows Software and have used the Trust Service previously
- You have at least 1 Trust entered onto your database
- You understand the concept of Gifting and what it means to your Trusts

Preparation for Level Session 3

- Print the Session Notes
- Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- Dial into the Meeting, using the Link & Password provided 5mins prior to start time