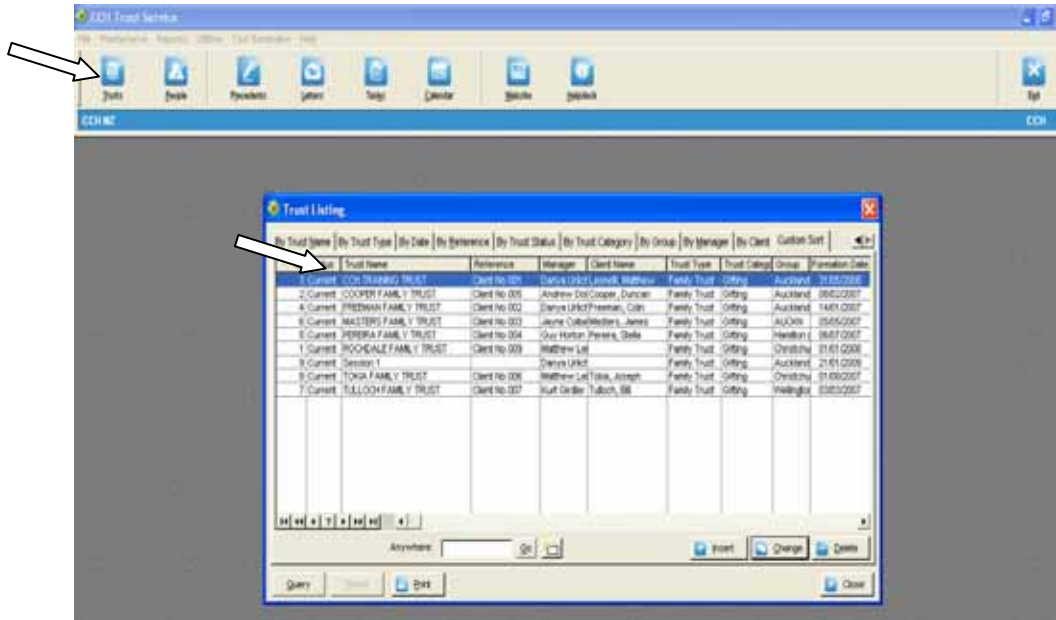


SESSION 2.1

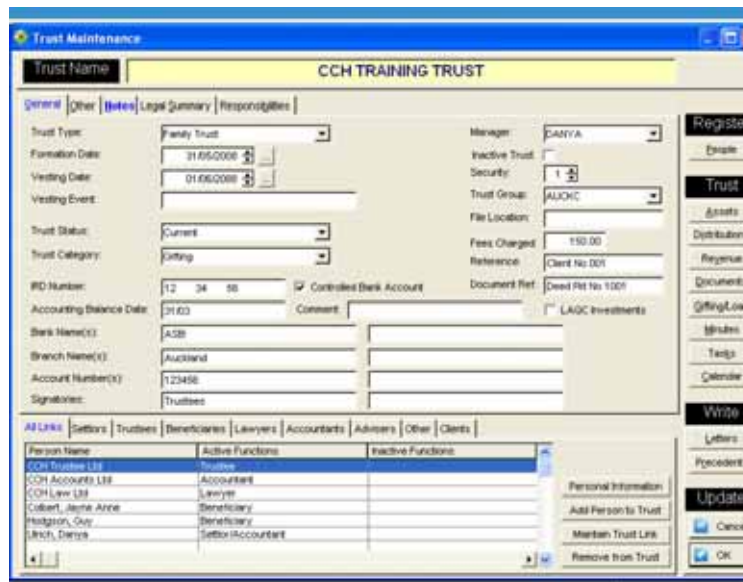
LEVEL 1

ADDING A GIFT ACCOUNT

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



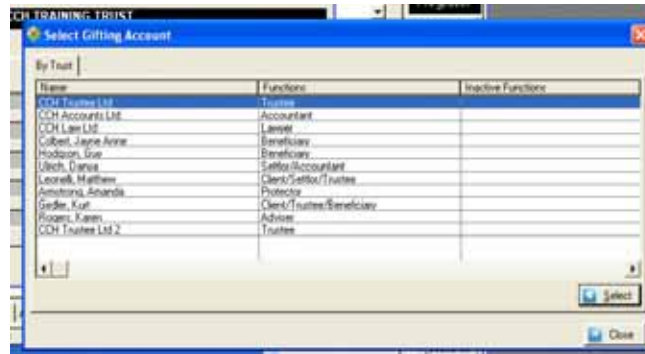
Select Gifting/Loan from Right Hand Menu to open the Gifting Loan Account



This opens the **Gifting & Loan Accounts** screen. You can have upto 10 accounts per Trust, 1 account is normally created per Settlor.



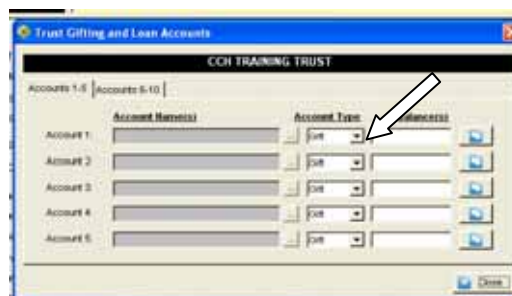
Select the small square at the end of Account 1 to bring up the People listing. This list will show only those people who have been linked to this Trust. For more information on Adding & Linking People see notes on Session 1.



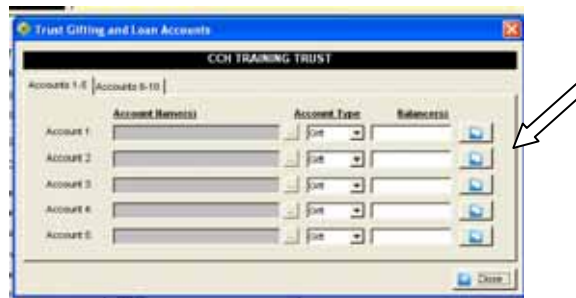
Select the name of the 1st Settlor from this list.

Repeat this process for Account 2 if there is more than 1 Settlor.

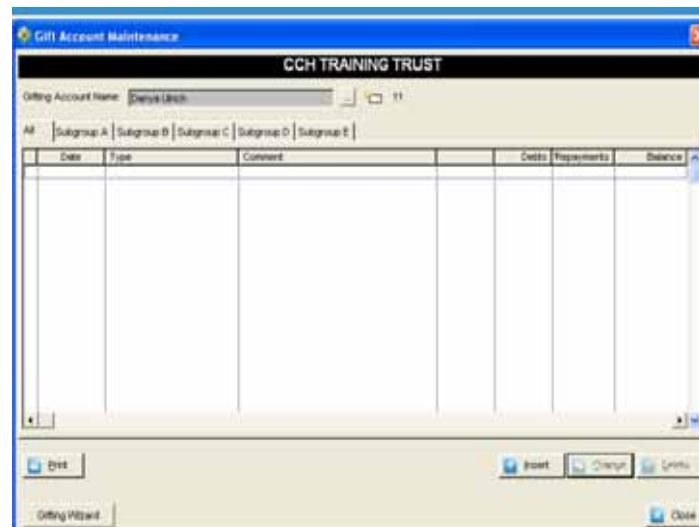
Use the arrow next to Account Type to select Gift account.



Open the Gift Account by selecting the Open icon



You should now see an empty Gift Account



Your Gift Account is set up and ready to use

If you need to remove a name from a Gift Account use the Clear button

