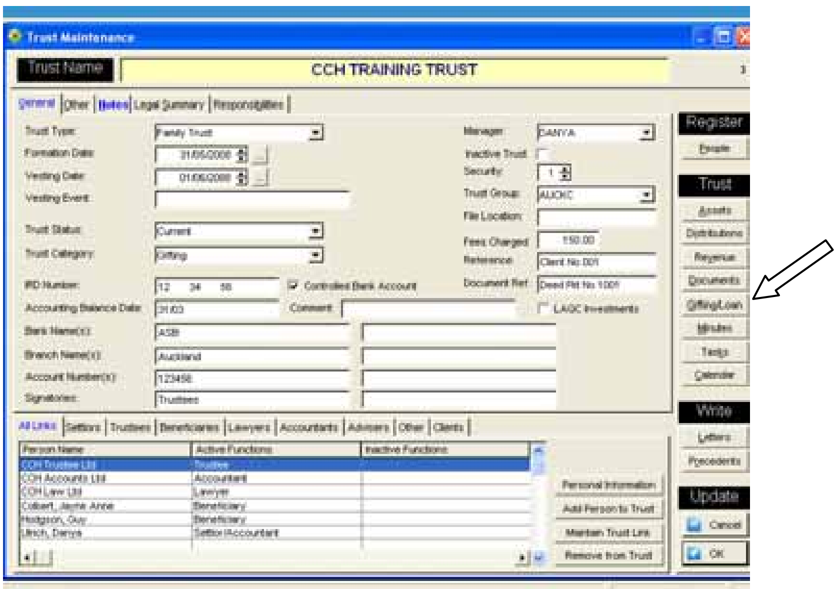
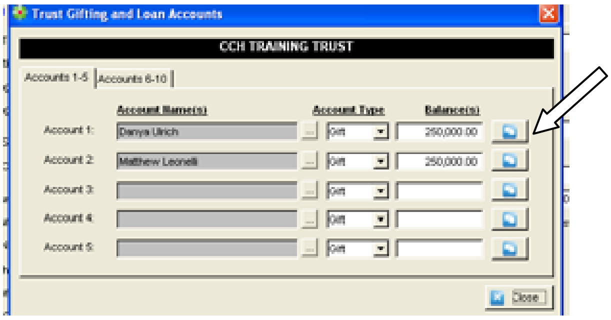
CREATING GIFTING DOCUMENTS

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

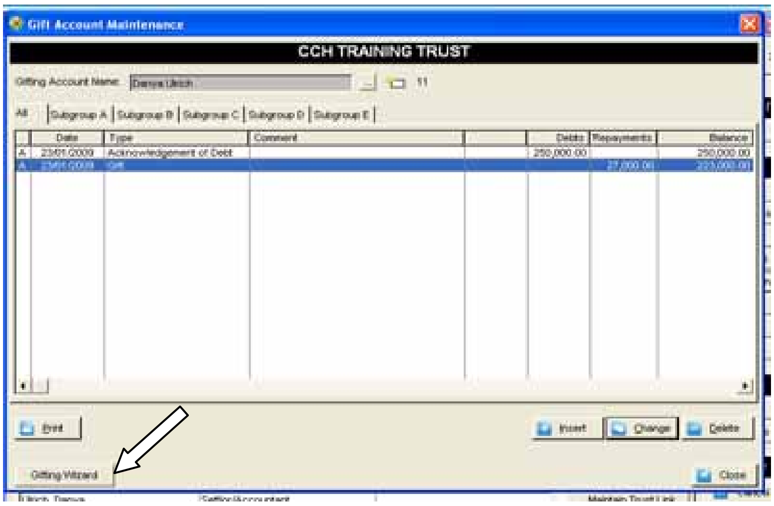
Select Gifting/Loan from Right Hand Menu to open the Gifting Loan Account



Open the Gift Account by selecting the Open icon



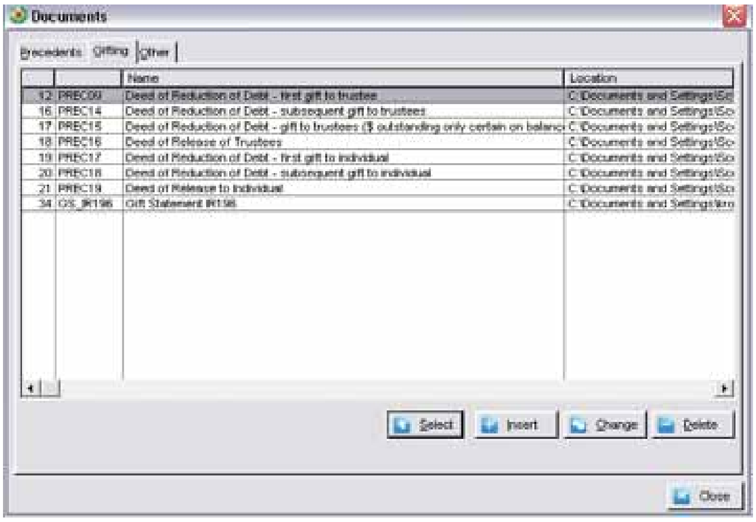
Select Gifting Wizard



You will now see the Gifting Wizard

Step 1 – Select Trust. This will be completed

Step 2 – Select Precedent



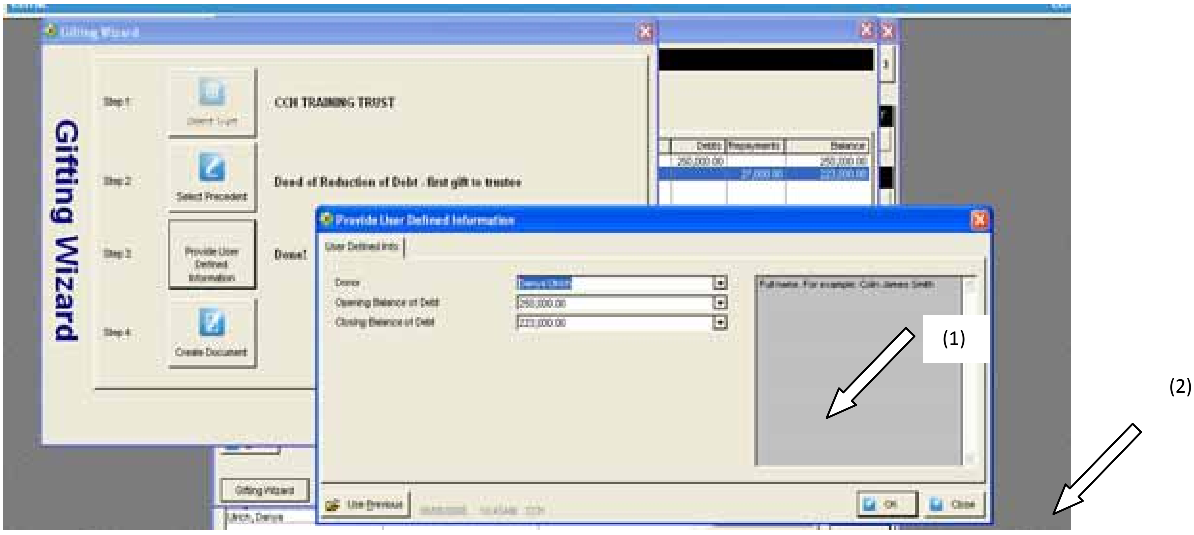
Select the appropriate document.

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)

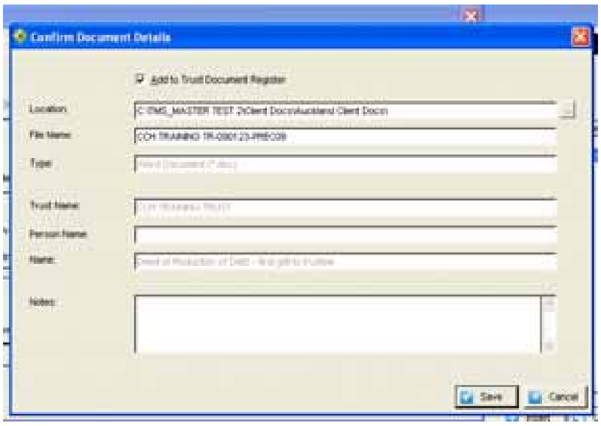


Step 3 – Create Document
Document is created & may be given a temporary file name (depending on your individual settings). Word should automatically open up with your document.

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.

Step 3 – Additional
You may see the Confirm Document Details Screen before your document is created. This is determined by your user settings. To learn more about this see the notes on 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.



You have now created your document using the CCH Template