CCH a Wolters Kluwer business

SESSION 2.8 LEVEL 1

Gifting Accounts & Documentation

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 Settlors
- 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	
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 www.cch.co.nz		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	
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	

For further help:

Select Help to access the Trust Service Help Files

Visit WWW.CCH.CO.NZ for training notes on previous session, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Tech Support 0800 500 224 for technical issues

Email Training@cch.co.nz if you have 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday