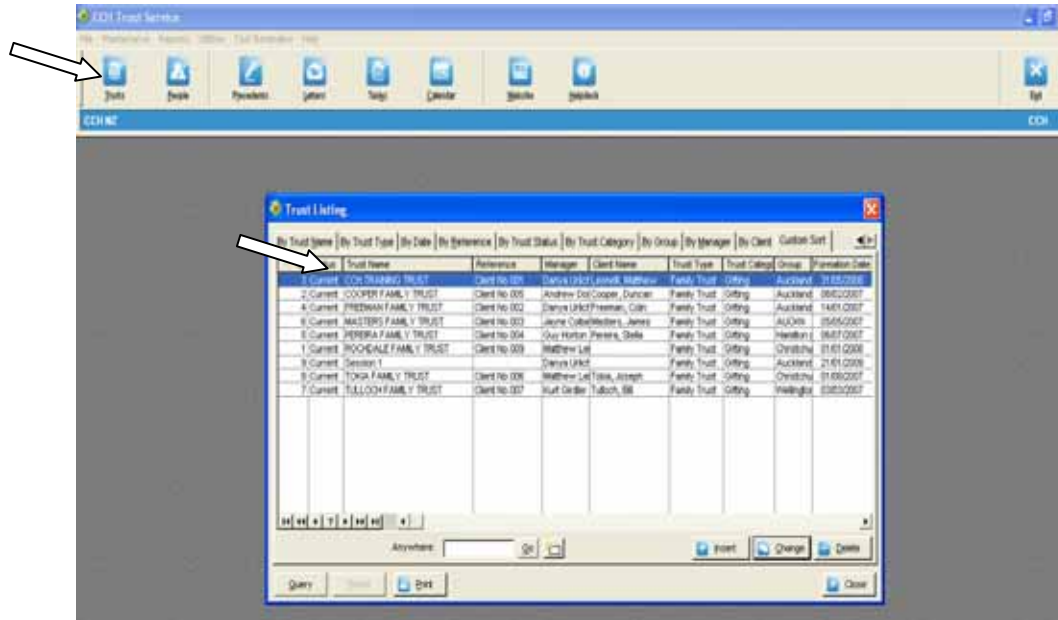


SESSION 3.1

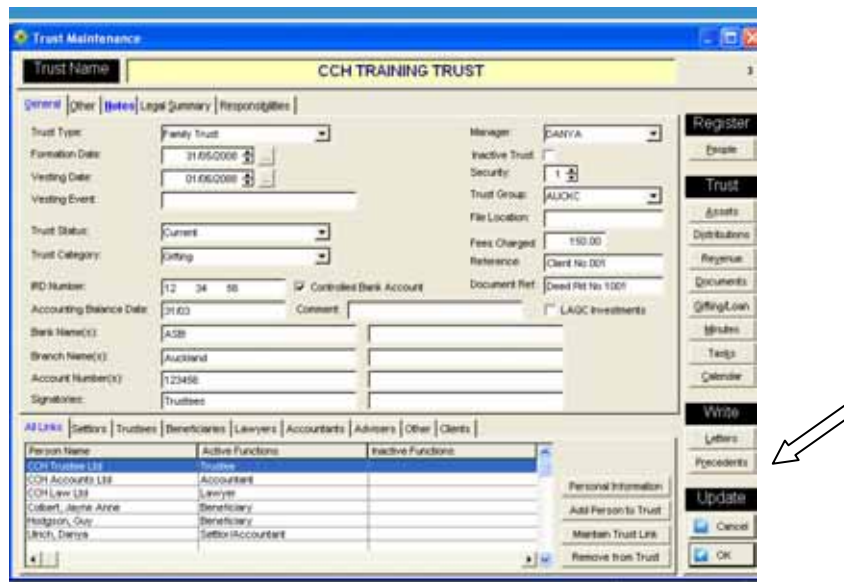
LEVEL 1

CREATING STANDARD DOCUMENTS USING PRECEDENT WIZARD

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



Select Precedents from Right Hand Menu to open the Precedent Wizard

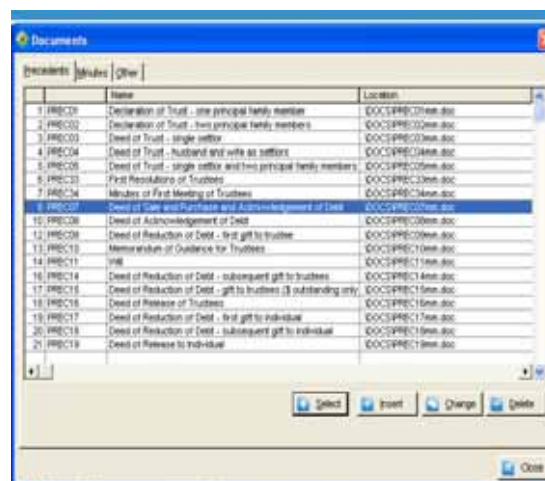


You can open the Precedent Wizard from the Top toolbar, however, it is more effective to access it via the Trust record shortcut as you will be able to import more information & reduce additional typing

Step 1 - Select Trust. This will be completed for you if you access the Wizard via the Trust record shortcut . If you have used the Shortcut from the top toolbar you will need to select the Trust



Step 2 - Select Precedent



There are 3 tabs - Precedents / Minutes / Others, each containing groups of precedents. Precedents & Other are the only 2 that should be used from this wizard. Minutes should be produced via the Minute Wizard

There is a list of the Standard CCH Precedents attached. Check you have them all as it is possible for people to delete them in error. Contact Support if you find you has lost any and they will help you to restore them (0800 500 224)

You can create additional bespoke templates if we have not provided one to suit your requirements. For more information on this see notes on Session 8.

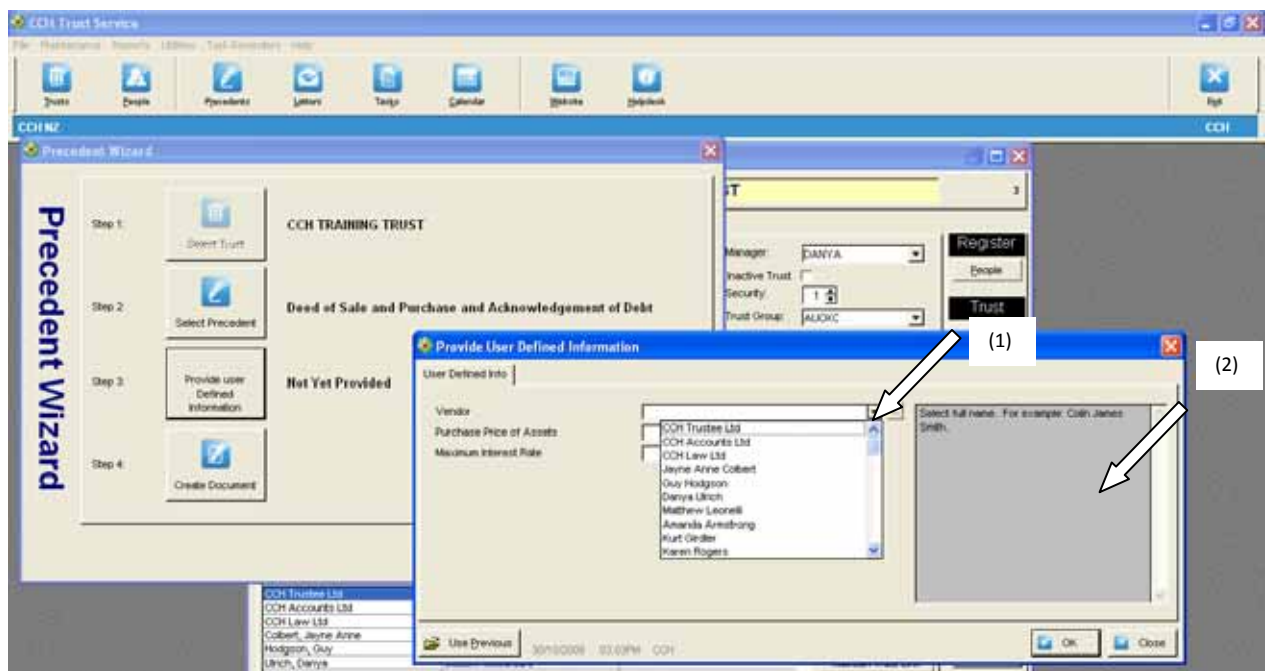
Step 3 - Provide User Defined Information

This is your opportunity to pull through as much information as you can from the Trust Record to reduce typing.

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, names of everyone associated with the trust (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 4 - Create Document

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

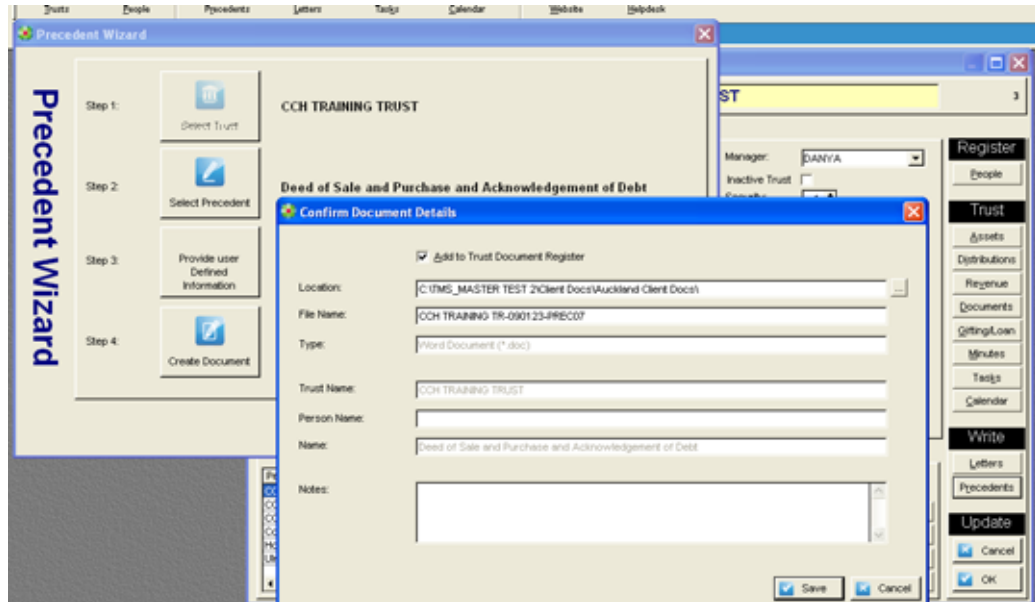
This document is now a Word document like any other. Amendments can be made if required.

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 feature see 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

Once the document is in Word you can edit it in any way you need to for this client. If there are amendments you need to make every time, for example, the margins of the document do not fit within your headed paper, you need to Customise the template. For more information on Customisation see notes on Session 8

List of Standard CCH Documents

Those highlighted are new in version 4.3

Precedents

Code	Description
PREC01	Declaration of Trust - One principle family member
PREC02	Declaration of Trust - Two principle family members
PREC03	Deed of Trust - Single Settlor
PREC04	Deed of Trust - Husband & Wife Settlor
PREC05	Deed of Trust - Single Settlor & Two principle family members
PREC06	Removed from CCH Trust Service
PREC07	Deed of Sale & Purchase & Acknowledgement of Debt
PREC08	Deed of Acknowledgement of Debt
PREC10	Memorandum of Guidance for Trustees
PREC11	Will
PREC12	Removed
PREC13	Removed
PREC20	Removed
PREC21	Removed
PREC22	Deed of Appointment of Trustees - Death of one Trustee
PREC23	Deed of Appointment of Trustees - 1 ret, 1 apt, 1 cont
PREC24	Deed of Appointment of Trustees - 1 ret, 1 apt, multi cont
PREC25	Deed of Appointment of New Trustee of Estate - Death of one Trustee
PREC26	Deed of Appointment of New Trustee of Estate - All Trustees Retire
PREC27	Deed of Appointment & Retire of Trustees - one Trustee cont
PREC28	Relationship Property Agreement - Tenancy in common/joint
PREC29	Relationship Property Agreement - Specific property to one partner
PREC30	Relationship Property Agreement - Covering election on death & trusts
PREC31	Memorandum of Guidance for Trustees - one settler
PREC32	Deed of Appointment of Additional Trustee - no retirement
PREC33	First Resolutions of Trustees
PREC34	Minutes of First Meeting of Trustees
PREC35	Deed of Retirement of Trustee - no replacement trustee appointed
PRECX40	Deed of Appointing Additional Discretionary Beneficiary
PRECX41	Deed Removing Beneficiary

Gifting Precedents

Code	Description
PREC09	Deed of Reduction of Debt - First gift to Trustees
PREC14	Deed of Reduction of Debt - Subsequent gift to Trustees
PREC15	Deed of Reduction of Debt - Gift to Trustees(\$ outstanding)
PREC16	Deed of Release of Trustees
PREC17	Deed of Reduction of Debt - First gift to Individual
PREC18	Deed of Reduction of Debt - Subsequent gift to Individual
PREC19	Deed of Release of Individual
GS_IR19	Gift Statement - IR196 - Edited for 4.3 to new format to match IRDs

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Minutes

Code	Description
MIN01	Minute Document
RES01	Resolution Document

Letters

Code	Description
LET01	Example Letter - Client only
LET02	Example Letter - Several People with Trust
LET03	Example Letter - to IRD

Other

Code	Description
	Trust Review Form With Bookmarks
	Trust Review Form