

Case Study

Conning Barraclough Chartered Accountants improves trust management with CCH iTrust Cloud Trust Management Software

Before subscribing to CCH iTrust, Conning Barraclough used a manual system to manage their clients' trusts.

Graeme Conning explains their rationale for signing up to iTrust, the transition process and the benefits of the new system for the firm and their clients.

Why iTrust?

"As a firm we're focused on keeping on top of our internal processes. We weren't entirely happy with our trusts process and were aware of the increasing need to improve in this area.

We had heard about iTrust so decided to investigate: once we saw the system we knew it was a good fit for us."

The transition process

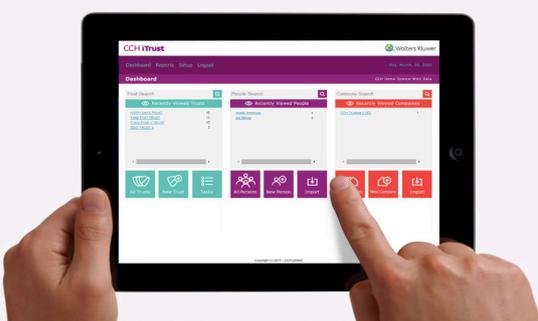
"The easy part was getting iTrust onto our system and going through the iTrust training. This was very good and comprehensive. We are (and have to be) responsible for uploading trusts data into iTrust. In order to avoid overwhelm we've opted to do this just before we meet a client with a trust."

"One thing I would say to others considering iTrust is that the transition process is very easy but you will need to plan the resources you'll require to upload the data if you're moving from a manual system. Having said that, don't let this put you off because there are easier-to-implement ways to go about it such as the approach we've adopted."

The benefits of iTrust

"It's still early days but we've been really impressed with the summary sheet as it means that, when we sit down with our clients, we'll be able to have a much better conversation. The system prompts us to fill in the gaps, for example to check the signatories, which allows us to better manage trusts."

"Whilst we're not lawyers, we use the available documents when we can in order to help our clients such as when they ask for our help with gifting."



"Trusts tend to be an add-on to an accountant's practice. iTrust helps us to lift our game and do a better job for our clients. Whilst it's a fantastic resource for us, it will really benefit lawyers who could use it day to day as a fee generating tool."