Wolters Kluwer

When you have to be right

Case Study

Generate Wealth Management, Pukekohe improves trust management with CCH iTrust Cloud Trust Management Software

Before subscribing to CCH iTrust, Generation Wealth Management used a heritage system provided to them by their Trust company.

They had identified the ability to continue using this software as a risk to the business and so the directors looked round for other trust systems.

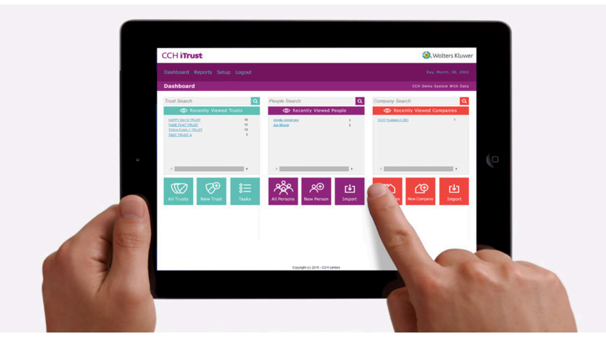
Why iTrust?

“ iTrust was the most practical trust management and administration system of those we looked at and liked.”

The transition process

“The transition process is ongoing and will likely take a year in total. Every time a trust is due to be reviewed we set it up in iTrust.”

“The CCH team have been extremely supportive. They are happy to come to our office to show us how to do things and when we have simple queries they send us clear, step-by-step instructions.”



“Learning any new process and system is daunting but once you’ve inputted a few trusts you find it’s simple enough. If your firm is considering switching from your existing system to iTrust, don’t let fear of creating more work put you off. This is something you can do over time and, if you have someone specialise in uploading your data to the system, it will make your life easier.”

“You can count on CCH’s support too. Our experience has been that they have done everything they can to make the transition process as easy as possible for us.”

The benefits of iTrust

“While we’re still in the transition phase, once everything is in iTrust, it’s going to mean it’s quick and easy to review each of our clients’ trusts and we’ll easily be able to access all documents in one place.”

“Because CCH automatically update resolutions and terminology in response to legislative changes, our clients can be confident that their trust documents are up-to-date and that, should they need to access them, they will be able to do so: and very quickly find what they’re looking for.”

Register for an iTrust demo Email gtaylor@cch.co.nz

Online www.wolterskluwer.co.nz/trusts-estates/cch-itrust/cch-itrust-demo/