

## CCH iTrust Trustee Portal

---

### What does it do?

Invited trustees can:

- View information on all People and Companies linked to the trust.
- View all gifting and load accounts.
- View all assets, liabilities, revenue and distributions.
- View all tasks and notes that have not been marked Firm Only.
- Download all trust documents.
- Print a trust summary report as PDF.
- Send a query via email directly to the company from the portal.
- Access more than one trust on a single login if they have multiple trust involvements.
- Set and manage their own passwords.

The firm can:

- Personalise the portal to their own company look and feel by changing the colours and adding a logo, or leave as the CCH iTrust default.
- Add an onscreen message for all portal users.
- Add personalised information to the invitation email.
- Switch portal access on or off per trustee/trust.
- Disable portal access completely if required.

## Access

Access is controlled by the person's relationship to the trust.

May access information via the Portal	Cannot access information via the Portal
Settlor	Beneficiary
Trustee	Adviser
Lawyer	Client
Accountant	Default Contact
Protector	Other

## Multiple trust involvement

1. For an invited person who is a trustee, settlor and beneficiary in Trust A and a beneficiary in Trust B:
  - Trust A = Access via portal
  - Trust B = No access via portal

This is controlled by the trust relationships.

2. A person who is a trustee in 3 separate trusts can have access to all trusts via the portal using the same login details.
  - Trust A = Access via portal
  - Trust B = Access via portal
  - Trust C = Access via portal

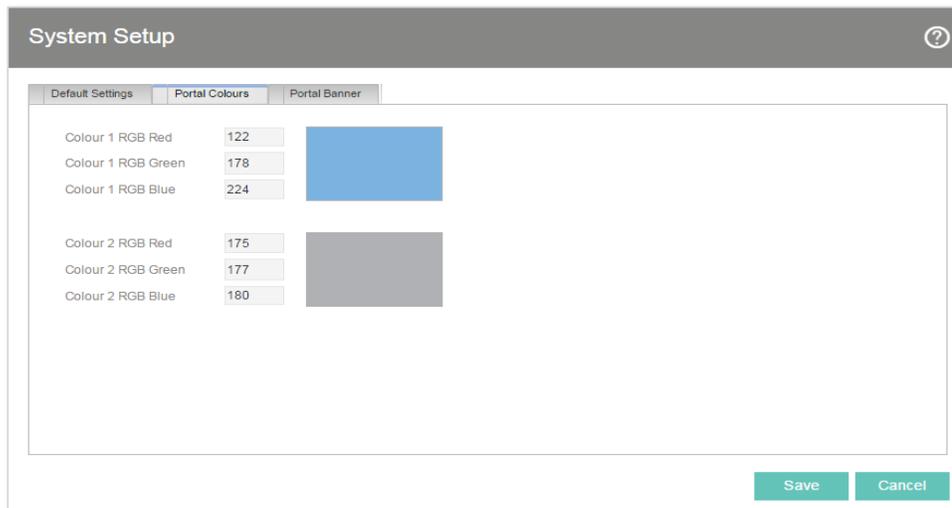
This is controlled via the person record and/or the trust relationship.

3. If a person is a trustee in 3 separate trusts but only 2 want to use the portal:
  - Trust A = Access via portal
  - Trust B = Access via portal
  - Trust C = No access via portal

This is controlled via the person record and/or the trust relationship.

## Firm implementation

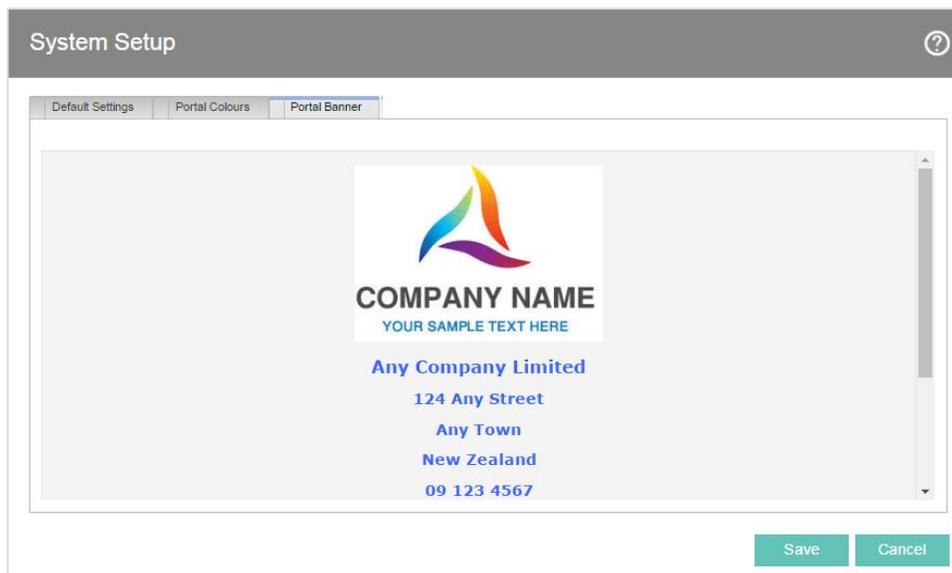
1. Add link to portal login on own web page: [www.cchitrustportal.com](http://www.cchitrustportal.com)
2. To set your preferred Portal Colours see under Setup / System Setup.



The screenshot shows the 'System Setup' window with the 'Portal Colours' tab selected. It contains two sections for color configuration. The first section, 'Colour 1', has input fields for RGB Red (122), RGB Green (178), and RGB Blue (224), with a corresponding blue color swatch. The second section, 'Colour 2', has input fields for RGB Red (175), RGB Green (177), and RGB Blue (180), with a corresponding grey color swatch. At the bottom right, there are 'Save' and 'Cancel' buttons.

Colour	RGB Red	RGB Green	RGB Blue
Colour 1	122	178	224
Colour 2	175	177	180

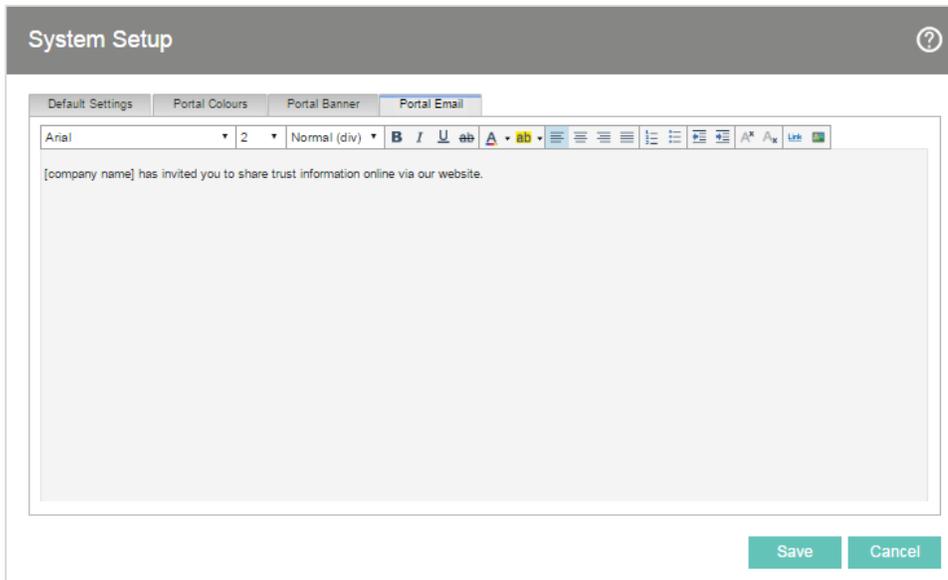
3. Add a logo and add any additional text under Setup / System Setup using Portal Banner.



The screenshot shows the 'System Setup' window with the 'Portal Banner' tab selected. The banner area displays a logo consisting of three stylized, overlapping shapes in blue, orange, and purple. Below the logo, the text reads: 'COMPANY NAME', 'YOUR SAMPLE TEXT HERE', 'Any Company Limited', '124 Any Street', 'Any Town', 'New Zealand', and '09 123 4567'. At the bottom right, there are 'Save' and 'Cancel' buttons.

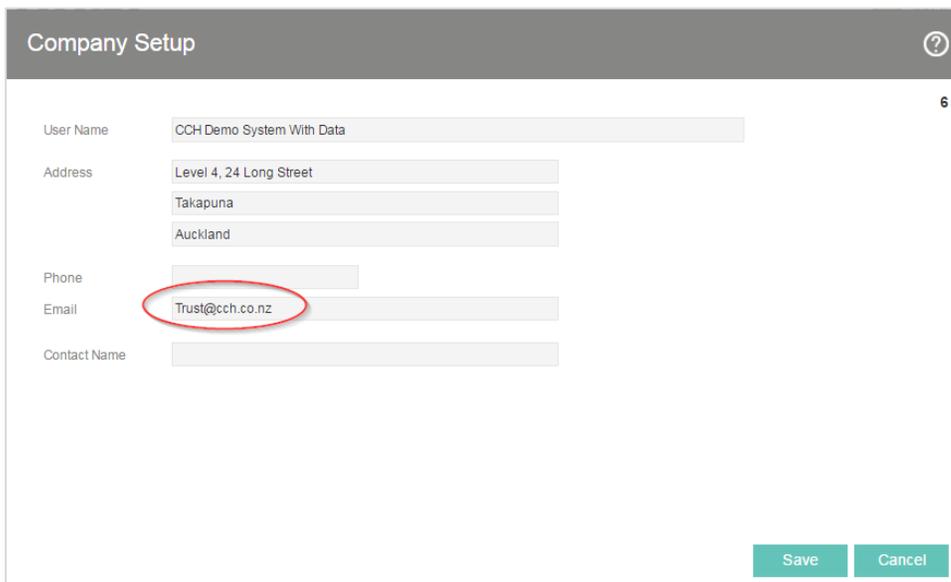
4. Add any additional text you would like to include in the invitation email by using Portal Email.

The client will receive this email containing the link to activate their portal access.



The screenshot shows the 'System Setup' interface with the 'Portal Email' tab selected. The main content area is a rich text editor with a toolbar and a text area containing the placeholder text: "[company name] has invited you to share trust information online via our website." At the bottom right, there are 'Save' and 'Cancel' buttons.

5. Ensure you have an email address in Company Setup.



The screenshot shows the 'Company Setup' form. The 'Email' field is highlighted with a red circle and contains the text 'Trust@cch.co.nz'. Other fields include 'User Name' (CCH Demo System With Data), 'Address' (Level 4, 24 Long Street, Takapuna, Auckland), 'Phone', and 'Contact Name'. At the bottom right, there are 'Save' and 'Cancel' buttons.

This address will receive queries from the portal.

You are now ready to invite trustees or other authorised parties to share information.



## Updating portal access to a specific trust via the trust record

1. Open the trust you want to update and go to Relationships.
2. Select the Person you want to update then click Modify.
3. Tick or untick Portal to change access.

The screenshot shows a table with columns for Person Name, Active Trust Relationships, and Inactive Trust Relationships. The 'Modify' button for Karen Rogers is circled in red.

Person Name	Active Trust Relationships	Inactive Trust Relationships	
CCH Accounts Ltd	Accountant		View
CCH Law Ltd	Lawyer		Add
CCH Trustee Ltd (1D)	Trustee		Modify
<b>Karen Rogers</b>	<b>Beneficiary/Settlor/Trustee</b>		Delete
Peter Rogers	Beneficiary/Settlor/Trustee		

The screenshot shows the 'Trust Link - Karen Rogers' page. The 'Portal' checkbox is checked and circled in red.

Person: Karen Rogers  Portal

Relationship	Start Date	End Date	Status	Details	Type	Comments	
Beneficiary	03/07/2015		Active				New
Settlor	03/07/2015		Active				Modify
Trustee	03/07/2015		Active				Remove

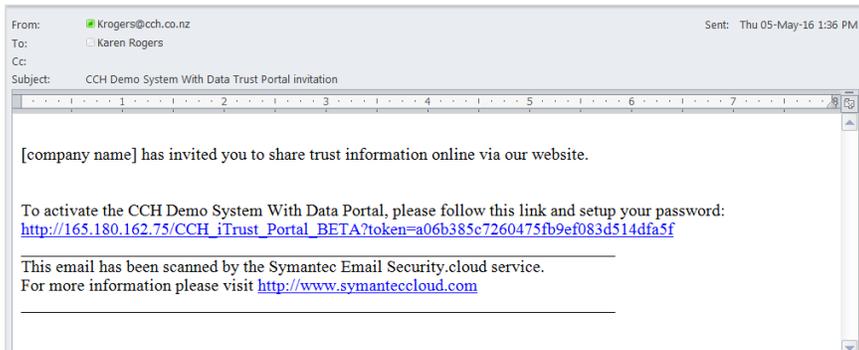
Save Cancel

Portal access for **this person** on **this trust** is turned on or off. Portal access to all other separate trusts remains.

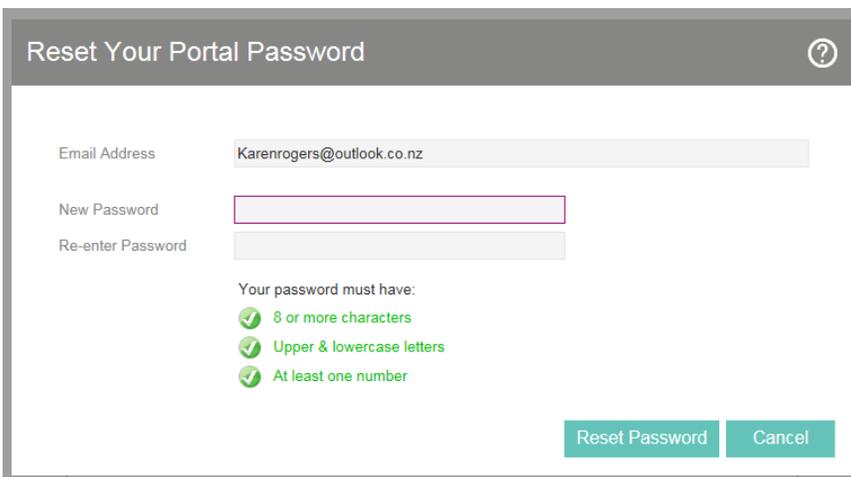
## Accepting an invitation to share information

This part of the process is entirely self-managed by your client.

1. The trustee/client clicks on the link within the invitation email they received.



2. Enter password



Reset Your Portal Password

Email Address: Karenrogers@outlook.co.nz

New Password:

Re-enter Password:

Your password must have:

- ✓ 8 or more characters
- ✓ Upper & lowercase letters
- ✓ At least one number

Reset Password Cancel

3. Login



Email Address: KRogers@cch.co.nz

Password: ●●●●●●●●

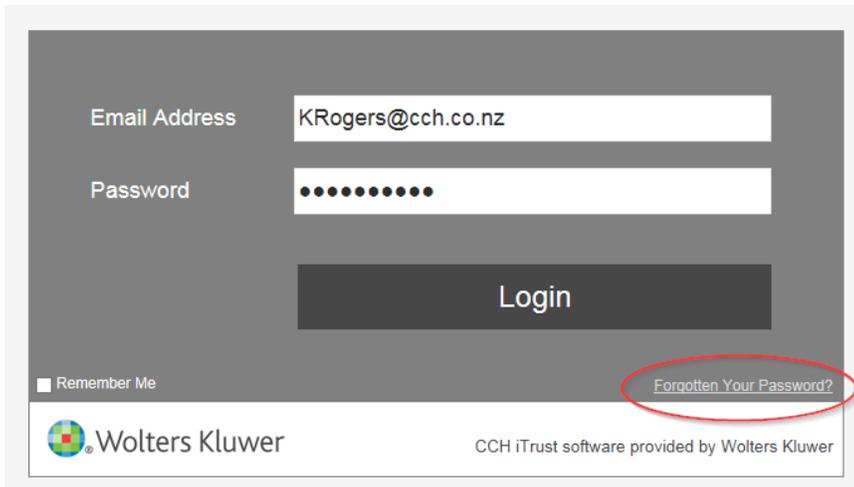
Login

Remember Me [Forgotten Your Password?](#)

Wolters Kluwer CCH iTrust software provided by Wolters Kluwer

## Forgotten passwords

1. Use the Forgotten Your Password link to reset.



The image shows a login form with the following elements:

- Email Address:** A text input field containing the email address "KRogers@cch.co.nz".
- Password:** A password input field with ten black dots representing the masked password.
- Login:** A dark grey button with the text "Login" in white.
- Remember Me:** A checkbox with the text "Remember Me" next to it.
- Forgotten Your Password?:** A link located at the bottom right of the form, circled in red.
- Footer:** The bottom of the form contains the Wolters Kluwer logo on the left and the text "CCH iTrust software provided by Wolters Kluwer" on the right.

## Portal screenshots

Trust selection for individuals with multiple trusts.

CCH Demo System With Data

Karen Rogers Logout

Please select the trust you wish to work with

- FREEMAN FAMILY TRUST
- JONES FAMILY TRUST
- ROGERS FAMILY TRUST
- Trust Wizard Trust



**COMPANY NAME**  
YOUR SAMPLE TEXT HERE  
Any Company Limited  
124 Any Street  
Any Town  
New Zealand  
09 123 4567

Office Hours:  
Monday - Friday 9am to 5:30pm

For Trust queries please use the Contact button on the left to email Sue Smith or call us on 09 123 4567

## Information dashboard

CCH Demo System With Data

FREEMAN FAMILY TRUST Karen Rogers Logout

Select Another Trust

- People
- Documents
- Tasks
- Accounts
- Summary Report
- Contact



**COMPANY NAME**  
YOUR SAMPLE TEXT HERE  
Any Company Limited  
124 Any Street  
Any Town  
New Zealand  
09 123 4567

Office Hours:  
Monday - Friday 9am to 5:30pm

For Trust queries please use the Contact button on the left to email Sue Smith or call us on 09 123 4567

## People Information

CCH Demo System With Data

FREEMAN FAMILY TRUST Karen Rogers Logout

Trust Relationships Back

**Amelia Armstrong**

Active Role(s)	Protector	Address	
Inactive Role(s)		Phone	
Responsibilities		Mobile	
		Email Address	

**CCH Accounts Ltd**

Active Role(s)	Accountant	Address	Hurstmere Road, Takapuna
Inactive Role(s)		Phone	09 123 456
Responsibilities		Mobile	021 123 456
		Email Address	

**CCH Law Ltd**

Active Role(s)	Lawyer	Address	Hurstmere Road, Takapuna, Auckland
Inactive Role(s)		Phone	
Responsibilities		Mobile	
		Email Address	

**CCH Trustee Ltd (1D)**

Active Role(s)	Trustee	Address	Hurstmere Road, Takapuna, Auckland
Inactive Role(s)		Phone	09 1234 4567
Responsibilities		Mobile	021 123 456

## Documents

CCH Demo System With Data

FREEMAN FAMILY TRUST Karen Rogers Logout

Trust Documents Document Search

- 09/12/2015  [Deed of Acknowledgement of Debt](#)
- 30/10/2015  [Deed of Variation of Clause 7 for DECL01 \(Declaration of Trust - one Principal Family Member\)](#)
- 30/10/2015  [Deed of Variation of Clause 7 for DECL02 \(Declaration of Trust - two Principal Family Members\)](#)
- 30/10/2015  [Deed of Variation of Clause 7 for DEED01 and DEED03 \(Deed of Trust\)](#)
- 30/10/2015  [Deed of Variation of Clause 7 for DEED02 \(Deed of Trust - husband and wife as settlor\)](#)
- 03/09/2015  [Minute - annual](#)
- 03/09/2015  [Minutes - first meeting of trustees](#)
- 03/09/2015  [Minute - income distribution](#)
- 03/09/2015  [Minute - gifting](#)
- 03/09/2015  [Minute - gifting](#)
- 03/09/2015  [Minute - annual](#)
- 03/09/2015  [Minute - annual](#)
- 03/09/2015  [Resolution of Trustees - minute builder](#)
- 02/09/2015  [Deed of Acknowledgement of Debt](#)

© 2015 - 2016, CCH Limited - CCH Trust software provided by Wolters Kluwer

## Tasks

CCH Demo System With Data

FREEMAN FAMILY TRUST Karen Rogers [Logout](#)

Trust Tasks Task Search  [Reset](#) [Back](#)

Date	Completed	Manager	Notes	
02/01/2016		Doris Upton	Gifting	⌵
02/12/2015		Simone Timmings	Annual Review	
15/09/2015		Doris Upton	needs address	
02/01/2015	23/06/2015	Doris Upton	Gifting	
02/12/2014	23/06/2015	Simone Timmings	Annual Review	
02/01/2014	04/03/2014	Doris Upton	Gifting	
02/12/2013	04/03/2014	Simone Timmings	Annual Review	
02/01/2012	10/11/2013	Doris Upton	Gifting	
02/12/2011	10/11/2013	Simone Timmings	Annual Review	
02/01/2011	31/05/2011	Doris Upton	Gifting	
02/12/2010	31/05/2011	Simone Timmings	Annual Review	
08/12/2009	19/10/2010	Doris Upton	Check if Minutes have been signed and returned	
02/12/2009	19/10/2010		Annual Review	

Copyright (c) 2015 - 2016, CCH Limited - CCH iTrust software provided by Wolters Kluwer

## Accounts

CCH Demo System With Data

FREEMAN FAMILY TRUST Karen Rogers [Logout](#)

Trust Accounts [Back](#)

[Gifting](#) [Assets](#) [Distributions](#)

Copyright (c) 2015 - 2016, CCH Limited - CCH iTrust software provided by Wolters Kluwer

# Gift Account Summary

CCH Demo System With Data			
FREEMAN FAMILY TRUST			Karen Rogers Logout
Trust Accounts			Back
Gifting	Assets	Distributions	
Gifting Account Name	Account Type	Last Gifting	Balance
Colin Freeman		23/06/2015	\$61,000.00
Sarah Freeman		04/03/2013	\$115,000.00
Keith Freeman	Loan	31/07/2015	\$4,000.00
Kerry Rivers	Loan		\$2,500.00
Kerry Rivers	Gift	31/07/2015	\$0.00
Colin Freeman	Gift		\$300,000.00
Friday Trustees Ltd	Loan		\$1,400.00
Colin Freeman	Gift		\$300,000.00

# Summary Report – Prints a PDF Trust Summary Report containing all trust information

Trust Summary	
CCH Demo System With Data	
Printed: 03/05/2016 10:55	
<b>FREEMAN FAMILY TRUST</b>	4
<b>Trust Details</b>	
Trust Type :	Family Trust
Formation Date :	14/01/2007
Vesting Date :	13/01/2007
Vesting Event :	
Trust Status :	Current
Trust Category :	Gifting
IRD Number :	654-321
Account Balance Date :	31/03
Bank Name(s) :	ASB
Branch Name(s) :	Auckland
Account Number(s) :	12-3456-78
Signatories :	
Manager :	Doris Upton
Trust Group :	Auckland Central
Reference :	Client No 002
Document Reference :	Deed No 1002
Controlled Bank Account :	<input type="checkbox"/>
Qualifying Company :	<input type="checkbox"/>
Look-through Company :	<input type="checkbox"/>
<b>Settlers</b>	
Colin Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
Sarah Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
Kerry Rivers (Retired)	CCH NZ, Warehouse Way, Northcote 09 123 456
<b>Trustees</b>	
Colin Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
CCH Trustees Ltd (TD)	Hurstmere Road, Takapuna, Auckland 09 1234 4567
The ABC Family Trust	
Friday Trustees Ltd	
<b>Beneficiaries</b>	
Colin Freeman	1/15 Eaglemont Drive, Howick 09 278 5641

Trust Summary	
CCH Demo System With Data	
Printed: 03/05/2016 10:55	
<b>FREEMAN FAMILY TRUST</b>	4
<b>Settlers</b>	
Keith Freeman	1/15 Eaglemont Drive, Howick, Auckland 09 278 5641
Sarah Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
Kerry Rivers (Retired)	CCH NZ, Warehouse Way, Northcote 09 123 456
<b>Lawyers</b>	
CCH Law Ltd	Hurstmere Road, Takapuna, Auckland
Karen Rogers	
<b>Accountants</b>	
CCH Accounts Ltd	Hurstmere Road, Takapuna 09 123 456
<b>Advisers</b>	
Donna Usher	66 Dominion Road, Takapuna, North Shore 09 123 456
<b>Others</b>	
The ABC Family Trust	
<b>Clients</b>	
Colin Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
Sarah Freeman	1/15 Eaglemont Drive, Howick 09 278 5641
<b>Responsibilities</b>	
Annual review of trust	14/01/2007 Friday Trustees Ltd
<b>Legal Summary</b>	
Beneficiaries by Class :	
Appointment and Removal of Trustees :	
Power to Resettle :	
Decision Making Criteria :	
Cheque Signing :	
<b>Dated Notes</b>	
31/07/2015	Bob Brown Any old note, should be included
<b>Custom Data</b>	