

CONTACT US TODAY

P: 0800 500 224

E: NZ-Support@wolterskluwer.com

W: wolterskluwer.co.nz



Complete with a comprehensive collection of practical trust documents, templates and other resources

CCH iTrust™

Trust Management Cloudware

by NZ's longest established trust management provider



When quality is important

CCH iTrust is a cloud-based software package designed to streamline the creation and administration of trusts. It has been created, and is regularly updated, in collaboration with users to enhance the service you provide to your clients, and to improve the overall profitability of your practice.

History

CCH has been providing trust software and content for 20 years.

Expert Content

CCH iTrust comes complete with a comprehensive collection of practical trust documents, templates and other resources.

Current content – CCH iTrust content is maintained by a leading NZ trust specialist Pravir Tesiram and other expert trust practitioners. Legislative changes and case precedents are monitored constantly, to ensure timely and well-considered amendments to deeds and documents.

User-Driven development

Developed (and will continue to be developed) in close collaboration with users including full-time trust practitioners.

Why choose CCH iTrust™

- Significantly minimises risk associated with trusts management and compliance
- Improves productivity
- Saves time and money
- All the benefits of the Cloud, securely based in New Zealand
- Remote access, anywhere, anytime on any device
- Every document and record related to your trust in one place



Secure Cloudware

Enjoy all the benefits of cloud based computing with Dimension Data, a reliable New Zealand-based ICT infrastructure supplier in business for more than 35 years.

Features of CCH iTrust™

The CCH iTrust software makes the collection and management of trust data easy and it can be fully customisable to suit your practice and clients' needs.



A register of each person associated with the trust and their roles and responsibilities



Accurate and safe document and data management, accessible from anywhere



Use your own precedent templates. If your firm already has a collection of precedents and documents that you would like to continue using, simply and easily set them up in iTrust to merge with your trust data



Add completed documents - pre-existing completed precedents and documents can be attached to the relevant trust



Reports can be quickly generated and trust summaries are easily created



Customised reports can easily be set up to capture and view user-specific data



Gifting accounts can be set up for each person who has made advances to a trust



Linked to Outlook calendar for an easy overview of recurring and outstanding tasks



Client Portal - easy to set up online portal for Trustees to access trust documents

More About the Online Portal..

- Trustees can view all information around the trust in a secure online environment
- Trustees can download all trust documents
- Trustees can print a trust summary report as PDF (automatically excludes all information marked 'firm only')
- Trustees to send a query, via email directly to the company from the portal
- Trustees can access more than one trust on a single login if they have multiple trust involvement
- Customisable interface - personalize the portal with your own company logo and look and feel, or leave as iTrust default.
- Switch portal on or off as per your preference or can switch on or off per trust