



# CCH iTrust

## Trust Management Cloudware

CCH iTrust makes the collection and management of trust data simple and streamlines and centralises processes. Very easy to navigate, it is fully customisable to suit your practice and client needs.

### **Electronic ID Verification**

Integrated access to Cloudcheck, a service from Verifi Identity Services which verifies the identity of your clients for AML/CFT purposes in seconds using Australian and NZ data sources and global watchlists.

Capture and report AML/CDD information.

### **People Register**

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

### **Expert Content**

CCH iTrust comes complete with a comprehensive collection of practical trust documents, templates and other resources developed by leading trust specialists, and if your firm already has a collection of precedents and documents that you would like to continue using, they can be easily set up in iTrust to merge with your trust data.

### **Documents**

CCH iTrust has a comprehensive collection of over 130 practical trust documents, templates, precedents and checklists.

Legislative changes and case precedents are monitored to ensure timely and well-considered amendments to deeds and documents.

### **Add completed documents**

Pre-existing completed precedents and documents can also be attached to the relevant trust.

### **Assets**

Record all the trust assets, liabilities and loans between parties.

### **Gifting Accounts**

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

### **Client Portal**

Optional client portal - switch on or off as per your preference.

Your clients can view or download documents related to their company in a secure online environment.

Customisable portal interface - personalise with your own company logo.

### **Available anywhere, on any device**

Accurate and safe document and data management, accessible from anywhere, on any device.

### **Easy to use dashboard and navigation**

### **Manage tasks with an Outlook interface**

### **Report suite**

### **Fully integrated with CCH Companies**



## What makes a good trust management system?

A good trust management system like CCH iTrust is so much more than just a central repository of trusts information.

A good system reminds and prompts you and your team to be good trust managers by scheduling annual reviews, rent reviews and prompting you to gift if appropriate. It can facilitate ways to mitigate the risks associated with a trusts practice by encouraging a proactive approach to their management, and in so doing grow your revenue.

### Why chose CCH iTrust

- significantly minimises risk associated with trusts management and compliance
- Improves productivity which saves time and money
- Every document and record related to your trust in one place
- Remote access, anywhere, anytime on any device
- Developed in close collaboration with users
- Content is maintained by a leading NZ trust specialist practitioners and legislative changes and case precedents are monitored constantly, to ensure timely and considered amendments to deeds and documents
- All the benefits of the Cloud, securely based in Microsoft Azure
- History - CCH has been providing trust software and content for over 20 years

### What our clients say

“Trusts tend to be an add-on to an accountant’s practice. CCHB 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.

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.”

[Graeme Conning, Conning Barraclough Chartered Accountants](#)

“Learning any new process and system is daunting but once you’ve input 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.”

[Generate Wealth Management, Pukekohe](#)