

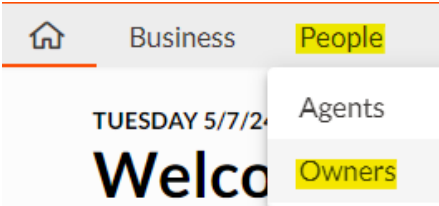
Getting Started with Trusts & Life Policies

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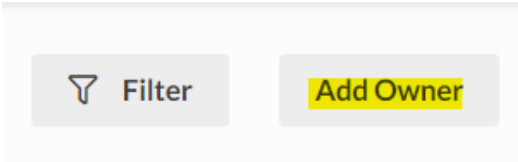
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How to add an Owner / Trust

- 1. Navigate to **People > Owners**



- 2. Click **Add Owner** in the top right corner



- 3. Under Type, select **Trust**, then enter the **Name** of the Trust. Click **Add Owner**

A screenshot of a modal window titled 'Add Owner'. It has a close button (x) in the top right corner. The form contains two fields: 'Type *' with a dropdown menu showing 'Trust' selected, and 'Name *' with a text input field containing 'Name'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Add Owner' (highlighted in blue).

4. You'll then be brought to that Trust's owner record. Click **Edit** to enter some additional Trust information like Tax Id and address information. Remember to **Save** your changes

Owners / Test Trust Owner

Test Trust Owner

Owner Information

- Details
- Policies
- Suitability
- Coverage Report

Details			
Type	Trust	Address 1	--
Display Name	--	Address 2	--
Full Name	Test Trust Owner	City	--
Tax Id	--	State	--
Email	--	Postal Code	--
Fax	--	Date of Birth	--
Phone	--	Has Signature Uploaded	No

[Edit](#)


How to add Trust Contacts and Edit Trust Details

1. Click the **Business** tab > hover over **Trusts** > select **Manage**

The screenshot shows a navigation bar with tabs: Home, Business, People, and Reports. The Business tab is active. A dropdown menu is open under Business, showing Life Policies, Trusts, and Owner Information. The Trusts dropdown is further open, showing Grantors, Manage, Premium Gifts, Trust Beneficiaries, and Trustees. The Manage option is highlighted.

2. **Search** for the Trust you would like to modify

Trusts



Death Benefit

\$1,150,000.00

Management

3. Next to the Name of the Trust, click the **Actions** button > **Trust Information**

Management

	Actions	Name of Trust
▼	⋮	Test Trust Owner

✎ **Trust Information**

👁 Crummey Management

5. Click **Edit Trust Details** to enter additional trust information. Remember to **Save** your changes

Test Trust Owner

Trust Details

[Edit Trust Details](#)

Name of Trust	Test Trust Owner	Gift Amount	--
Type of Trust	--	Gift Frequency	--
EIN # of Trust	--	Date of Next Gift	--
Date of the Trust	--	Administration Fee	No
State Trust was Established	--	Fee Amount	--
Premium Gifts	No	Date of Next Fee	--
Trust Signee	--		

- Under the Contacts Section click the contact you would like to add: **Add Trustee, Add Grantor, Add Beneficiaries**

Contacts

Trustees

There's nothing here yet!

[Add Trustee](#)

Grantors

There's nothing here yet!

[Add Grantor](#)

Beneficiaries

There's nothing here yet!

[Add Beneficiaries](#)

- Input** the contact(s) name and details. Click **Save**

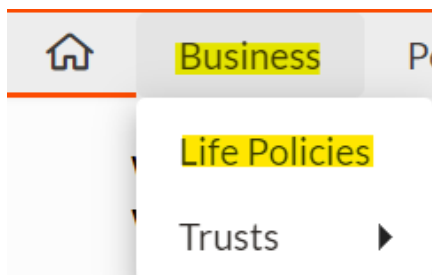
Add Beneficiary

Beneficiary *	<input type="text" value="Beneficiary"/>	Postal Code	<input type="text" value="PostalCode"/>
Address 1	<input type="text" value="Address 1"/>	Date of Birth	<input type="text" value="month/day/year"/>
Address 2	<input type="text" value="Address 2"/>	Email	<input type="text" value="Email"/>
City	<input type="text" value="City"/>	Share of assets	<input type="text"/>
State	<input type="text" value=""/>	Phone	<input type="text" value="Phone"/>

[Cancel](#) [Save](#)

How to add a Policy

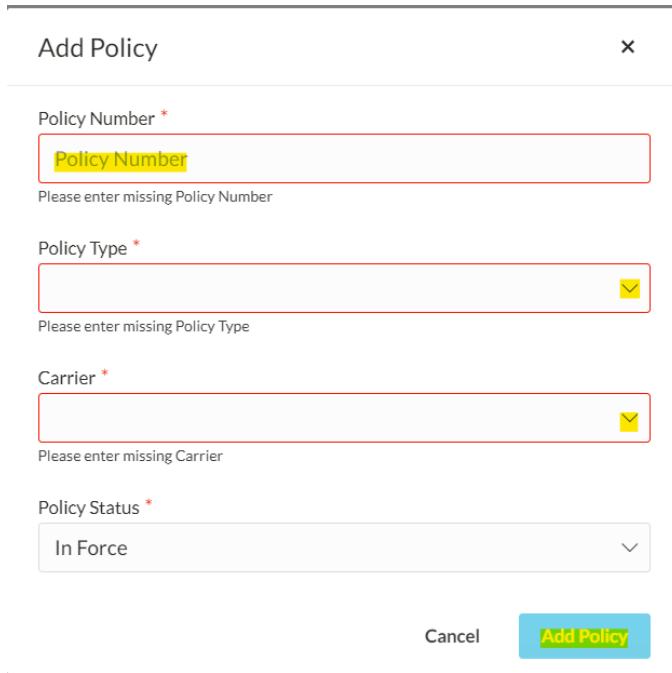
- Navigate to **Business > Life Policies**



2. Click **Add Policy** in the top right corner



3. **Input** the required policy information and click **Add Policy**

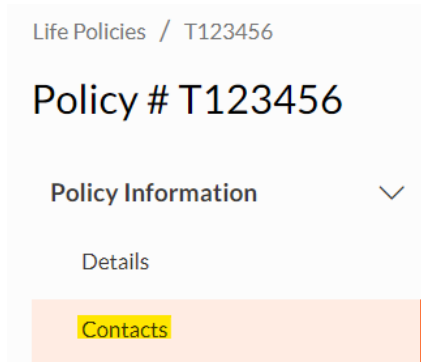
A screenshot of a modal window titled 'Add Policy' with a close button (x) in the top right. The form contains four fields, each with a red border indicating an error: 'Policy Number *' with a text input containing 'Policy Number' and the message 'Please enter missing Policy Number'; 'Policy Type *' with a dropdown menu and the message 'Please enter missing Policy Type'; 'Carrier *' with a dropdown menu and the message 'Please enter missing Carrier'; and 'Policy Status *' with a dropdown menu showing 'In Force'. At the bottom, there are 'Cancel' and 'Add Policy' buttons.

4. You will then be brought to the policy's Policy Details page where you can click **Edit** to add additional policy information. Remember to **Save** your changes



How to link a Trust to a Policy

1. **Navigate** to a policy's Policy Details page
2. Click the **Contacts** tab



3. Click **Add Owner to Policy**

Owners

There's nothing here yet!

Add Owner to Policy

4. **Search** for an Existing Owner and click **Add Owner**

Add Owner to Policy ×

Existing New

Owner *

Please enter missing Owner

Cancel **Add Owner**

5. Please note you can also add Agents, Insureds, Beneficiaries, and Other Advisors under this Contacts tab within the policy