Getting Started with Trusts & Life Policies

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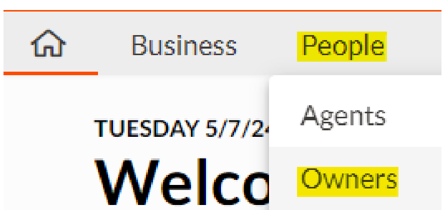
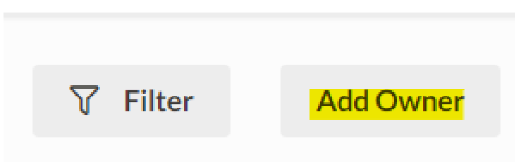
How to add an Owner / Trust

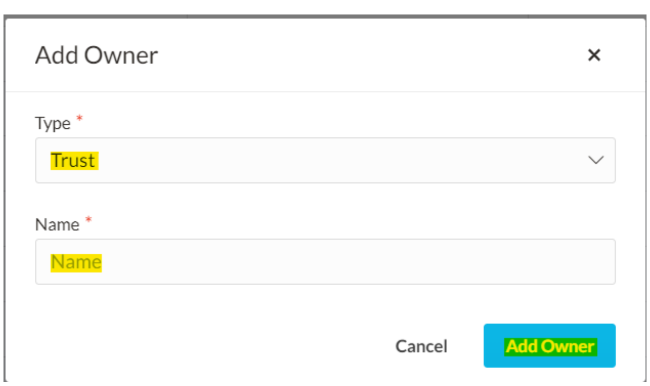
1. Navigate to **People** > **Owners**



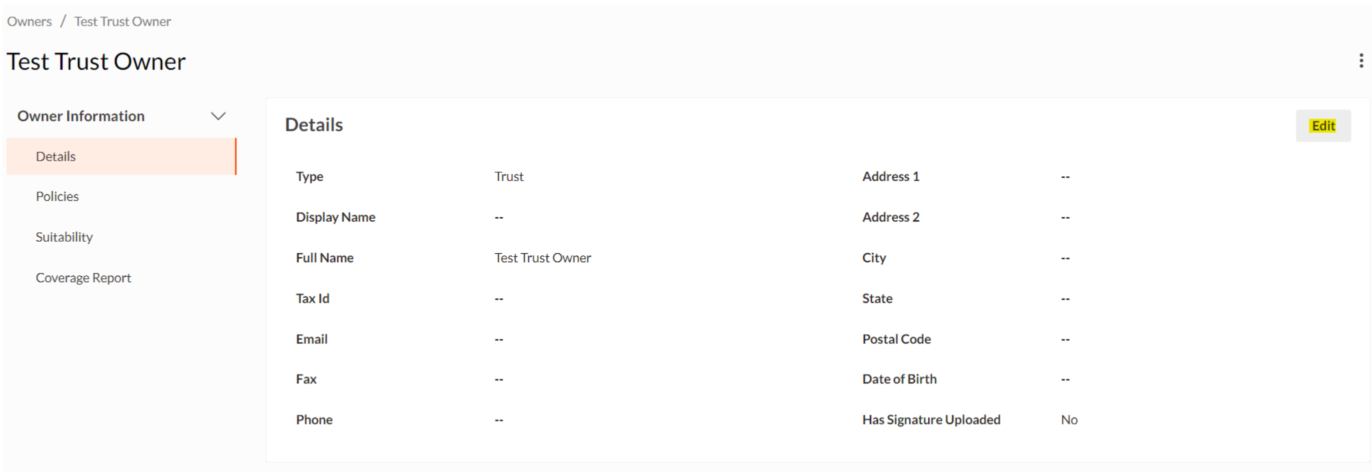
2. Click **Add Owner** in the top right corner



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

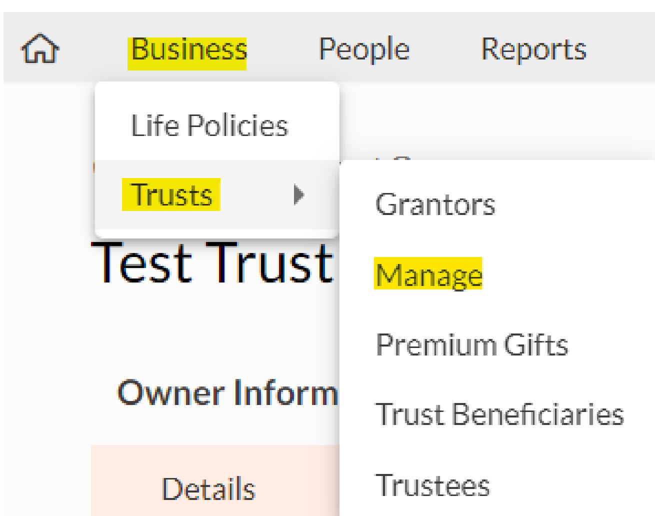


4. You'll then be brought to that Trust's owner record. Click **Edit** to enter some additional Trust information like Tax Id and address information. Remember to **Save** your changes

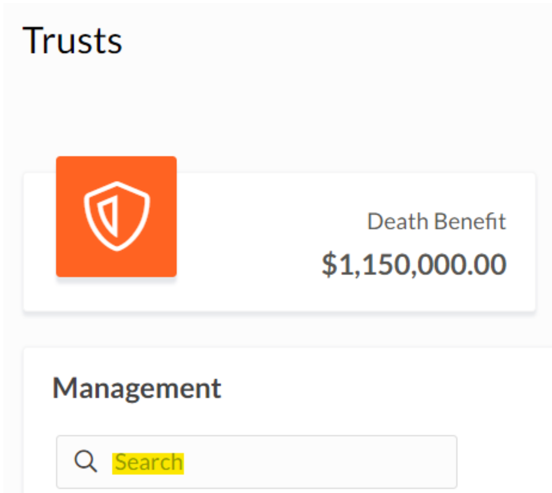


How to add Trust Contacts and Edit Trust Details

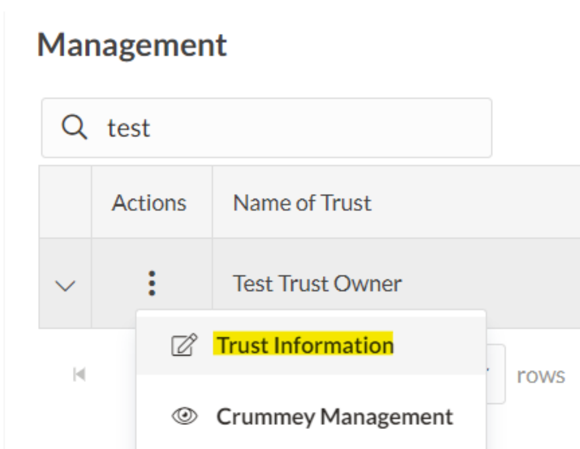
1. Click the **Business** tab > hover over **Trusts** > select **Manage**



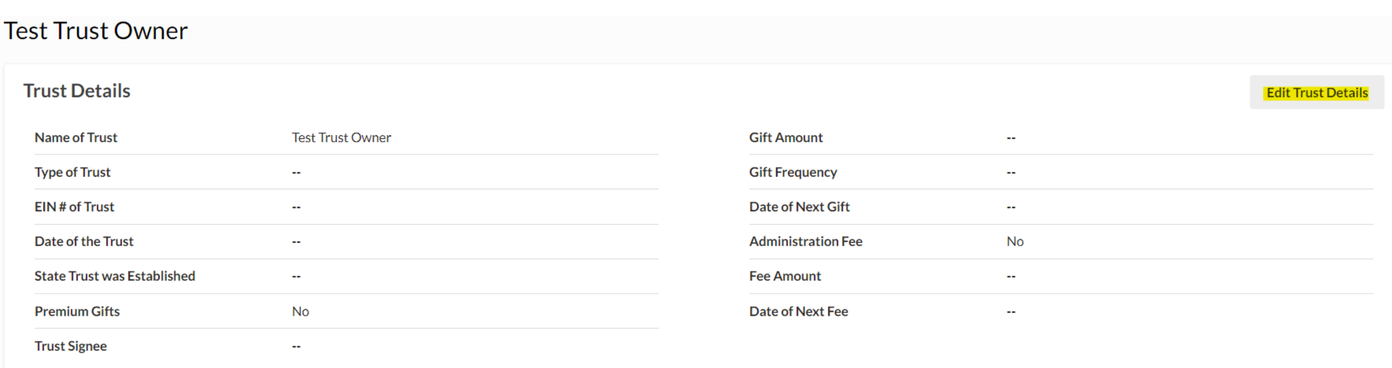
2. **Search** for the Trust you would like to modify



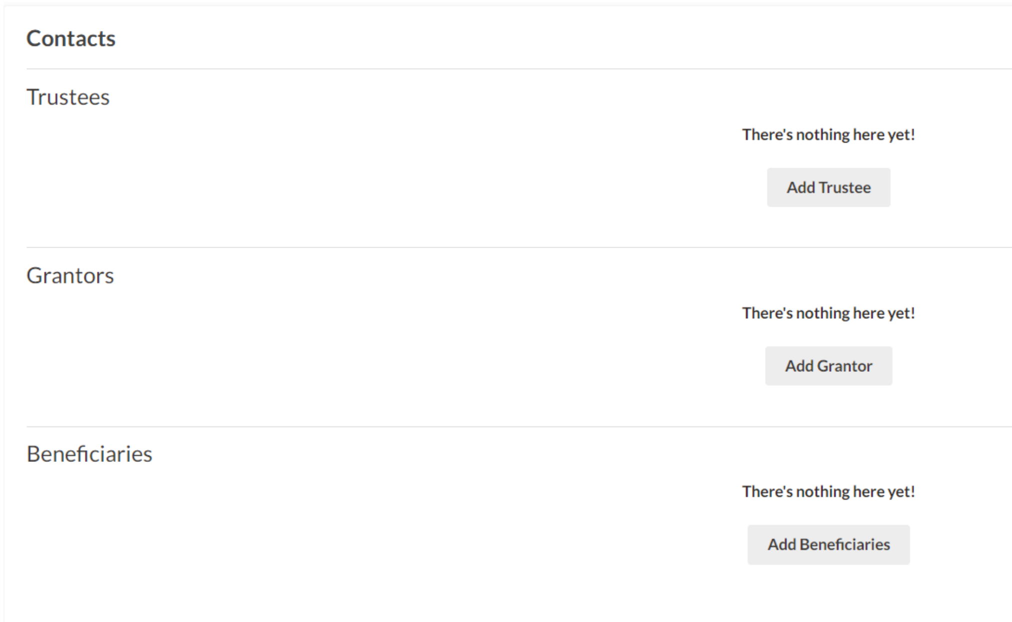
3. Next to the Name of the Trust, click the **Actions** button > **Trust Information**



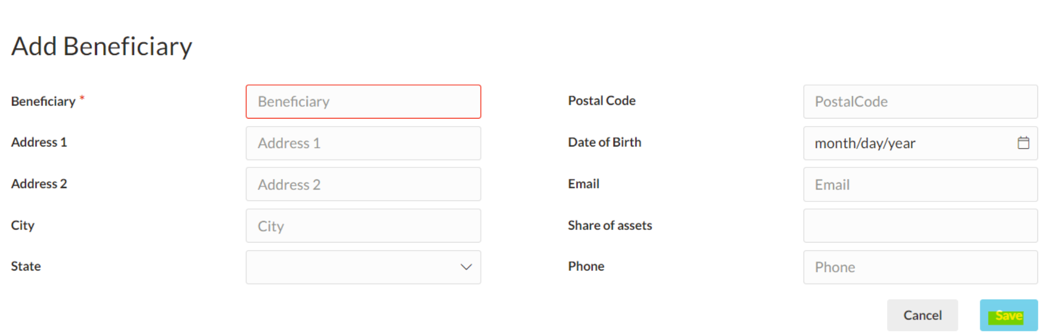
5. Click **Edit Trust Details** to enter additional trust information. Remember to **Save** your changes



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

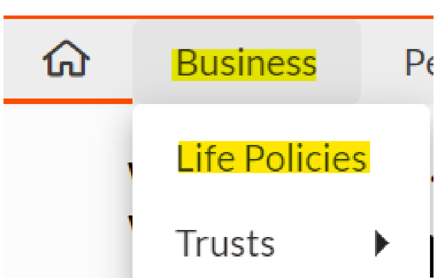


5. **Input** the contact(s) name and details. Click **Save**

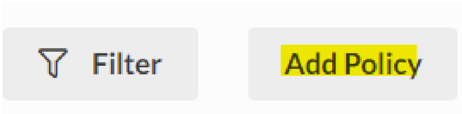


How to add a Policy

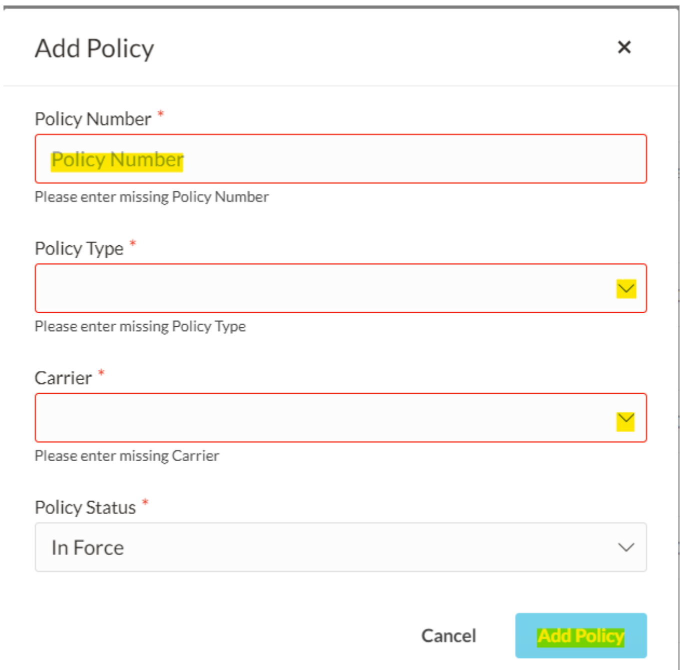
1. Navigate to **Business** > **Life Policies**



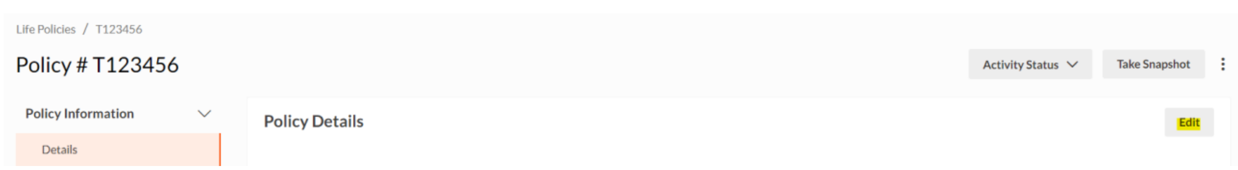
2. Click **Add Policy** in the top right corner



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

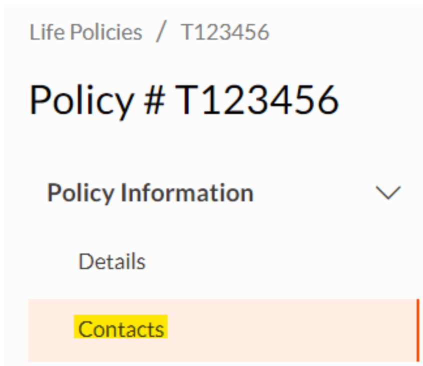


4. You will then be brought to the policy's Policy Details page where you can click **Edit** to add additional policy information. Remember to **Save** your changes



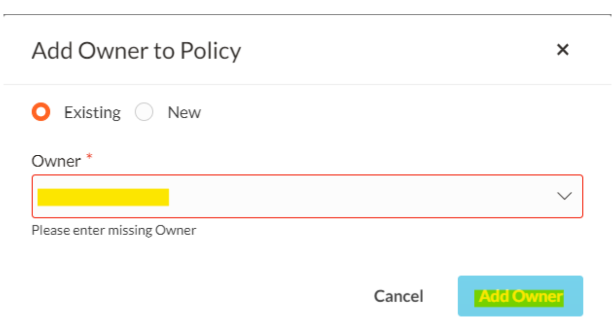
How to link a Trust to a Policy

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



3. Click **Add Owner to Policy**

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



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