# **PR**<sup>O</sup>FORMEX

## **Guide to Crummey Management**

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#### How to navigate to Crummey Management

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



2. Search for the Trust you would like to work with



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

#### Management



4. You'll then be brought to the Crummey Management page where you can view Trust Beneficiaries, manage Crummey Letters (Create, Edit, Delete, Download, Email), and add Transactions to the Trust Account Check Registry

lest Trus	st Owner					
Crummey Management						
Q Sear	ch			8		
Actions	Name	Email	% Share of Death Benefit			
Ø	Test Beneficiary 1	testbeneficary1@gmail.com	50%	*		
Ø	Test Beneficiary 2	testbeneficary2@gmail.com	50%	-		
N 4	1			1 - 2 of 2 beneficiaries		
Trust Ac	count Check Registry	There's nothing here yet! Add Transaction				

#### How to create and send a Crummey Letter

1. On the Crummey Management page, click the **Actions** button next to the Trust Beneficiary Name



2. Enter the message of your Crummey Letter and click Save

#### Add Trust Crummey Letter

Select font family	~	Select font size	$\sim$	в	I	Ū	Α	~	٥	~	≣	 ≣	Ħ	≡		123
Type or copy/paste here																
(i) Tip: Use 'Shift+Enter	' to add	spacing between lines														
													Canc	el	E	Save

3. To Edit or Delete the Crummey Letter you've already created, click the **Actions** button followed by the respective action you'd like to take

Actions	Name
•	Test Beneficiary 1
Delete Letter	
Ø	Edit Crummey Letter

4. To Download and preview the Crummey Letter, click the Trust Beneficiary Name **hyperlink** 



5. To Email the Crummey Letters to each Trust Beneficiary, click **Email** Crummey Letters in the top right corner. <u>Please note an email will be sent</u> to ALL Trust Beneficiaries with an email address and Crummey Letter that has been created.

Email (	Crum	ney Let	ters
		x	۶.

6. Click Confirm to send



7. You'll then see a confirmation in the top right corner that the email(s) have been sent



Please note the email will be sent from "**donotreply@proformex.com**" Example from Gmail:



How to add a transaction to the Trust Account Check Registry

1. On the Crummey Management page, click Add Transaction

Trust Account Check Registry	
	There's nothing here yet!
	Add Transaction

2. Input the details and click Save

~

3. You'll then see your entry populated on the table with the totaled Balance

Trust Account Check Registry						
Q Search					X	۶
Date	Description	Debit	Credit	Balance		
05/04/2024	test	\$0.00	\$5,000.00	\$10,000.00		^
05/03/2024		\$0.00	\$5,000.00	\$5,000.00		-

I ≤ 1 ► ► 10 ∨ rows

1 - 2 of 2 transactions

#### How to enable Trust User Notifications

1. Navigate to Settings > Notification Preferences



2. Under **Trust Notifications**, **enable** the desired user notifications. Please note, notifications must be enabled first at the Firm level to be accessible at the User level. If you need assistance, please contact your Account Admin or Customer Success Manager.

