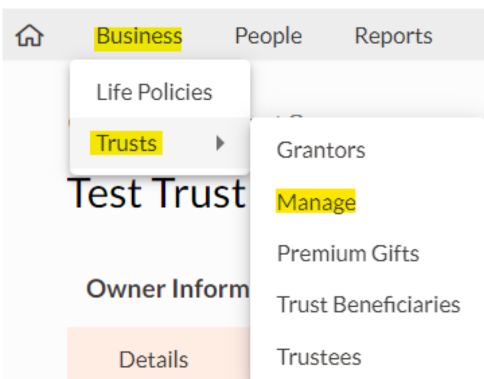
Guide to Crummey Management

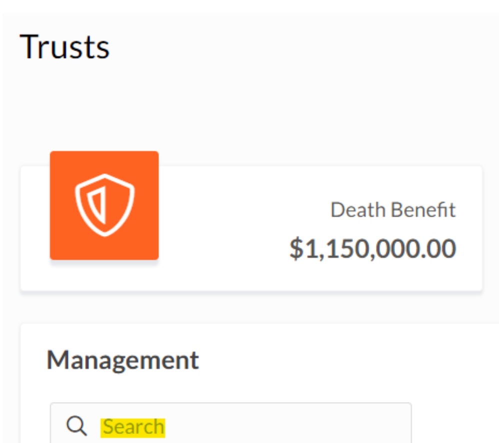
Contents

How to navigate to Crummey Management

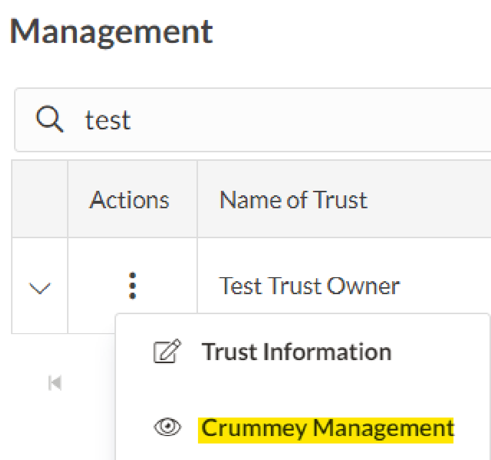
1. Click the **Business** tab > hover over **Trusts** > select **Manage**



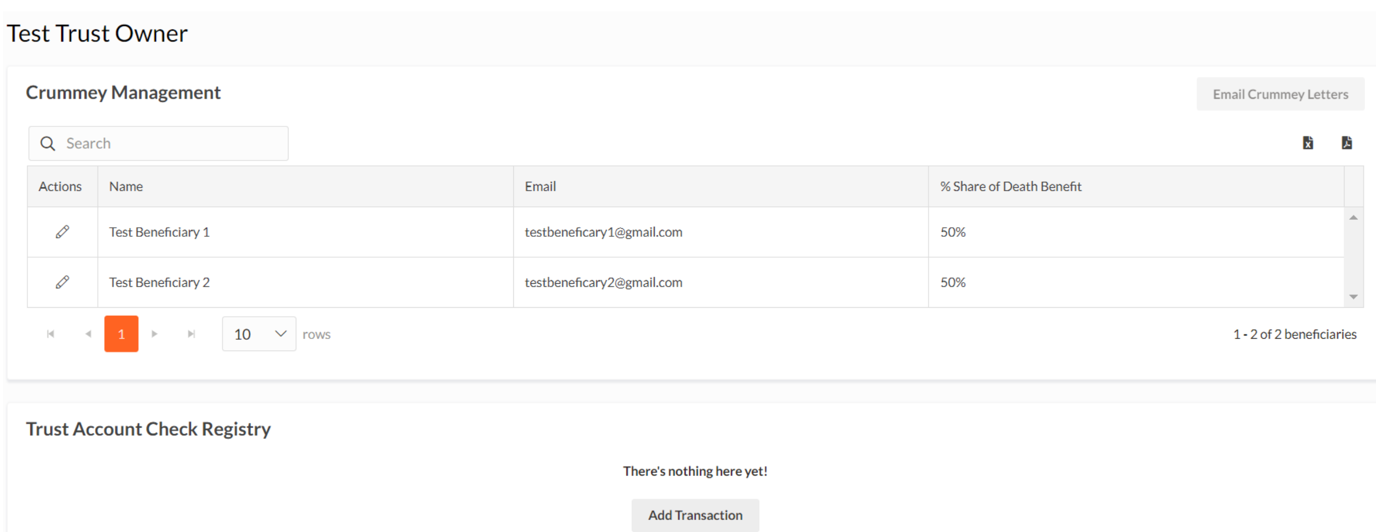
2. **Search** for the Trust you would like to work with



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

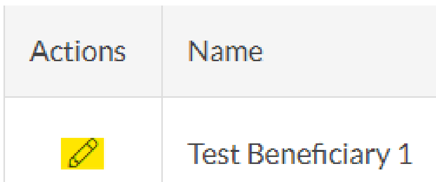


4. You'll then be brought to the Crummey Management page where you can view Trust Beneficiaries, manage Crummey Letters (Create, Edit, Delete, Download, Email), and add Transactions to the Trust Account Check Registry

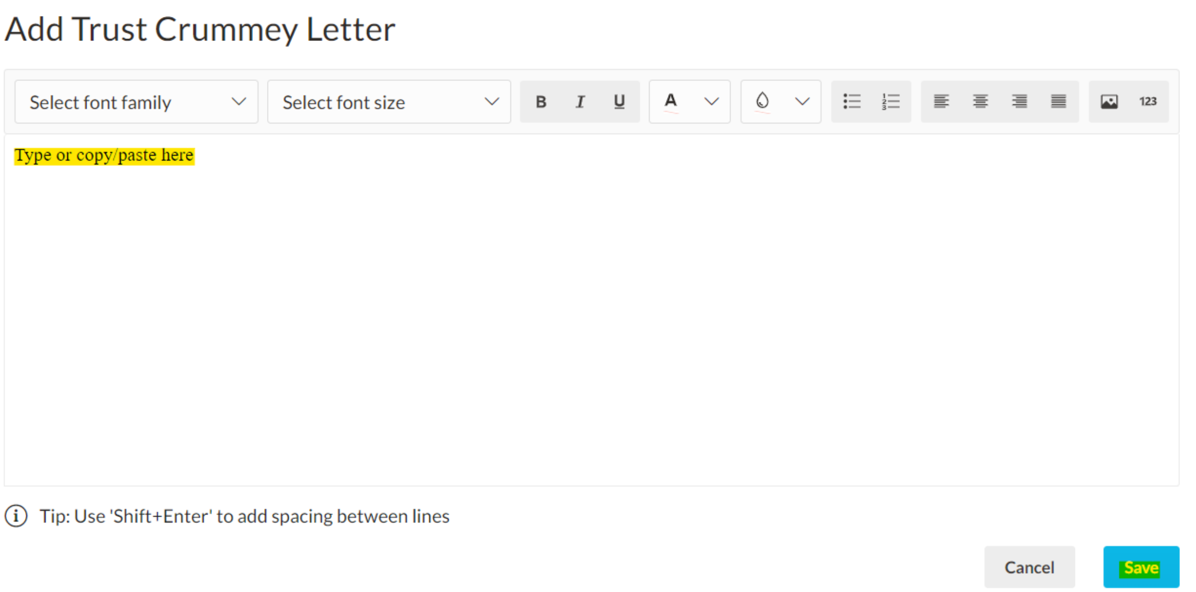


How to create and send a Crummey Letter

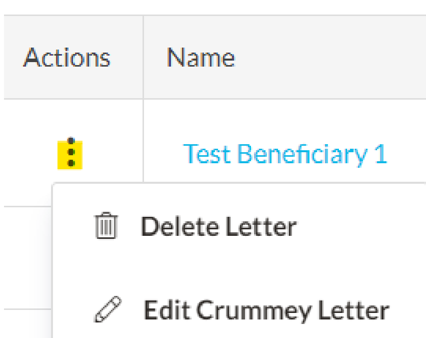
1. On the Crummey Management page, click the **Actions** button next to the Trust Beneficiary Name



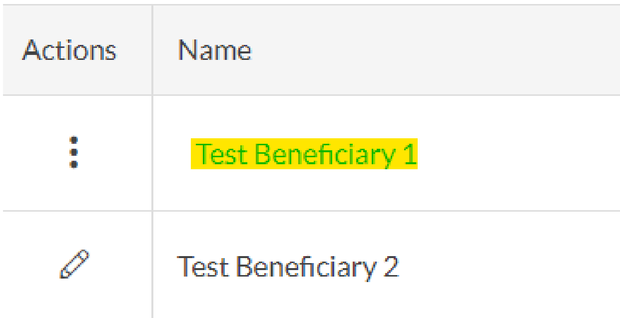
2. **Enter** the message of your Crummey Letter and click **Save**



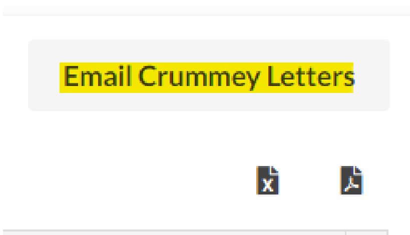
3. To Edit or Delete the Crummey Letter you've already created, click the **Actions** button followed by the respective action you'd like to take



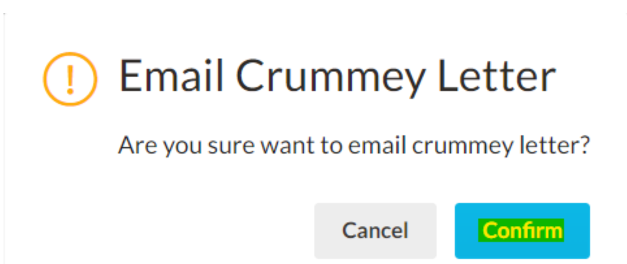
4. To Download and preview the Crummey Letter, click the Trust Beneficiary Name **hyperlink**



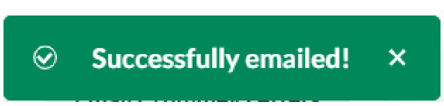
5. To Email the Crummey Letters to each Trust Beneficiary, click **Email Crummey Letters** in the top right corner. Please note an email will be sent to **ALL** Trust Beneficiaries with an email address and Crummey Letter that has been created.



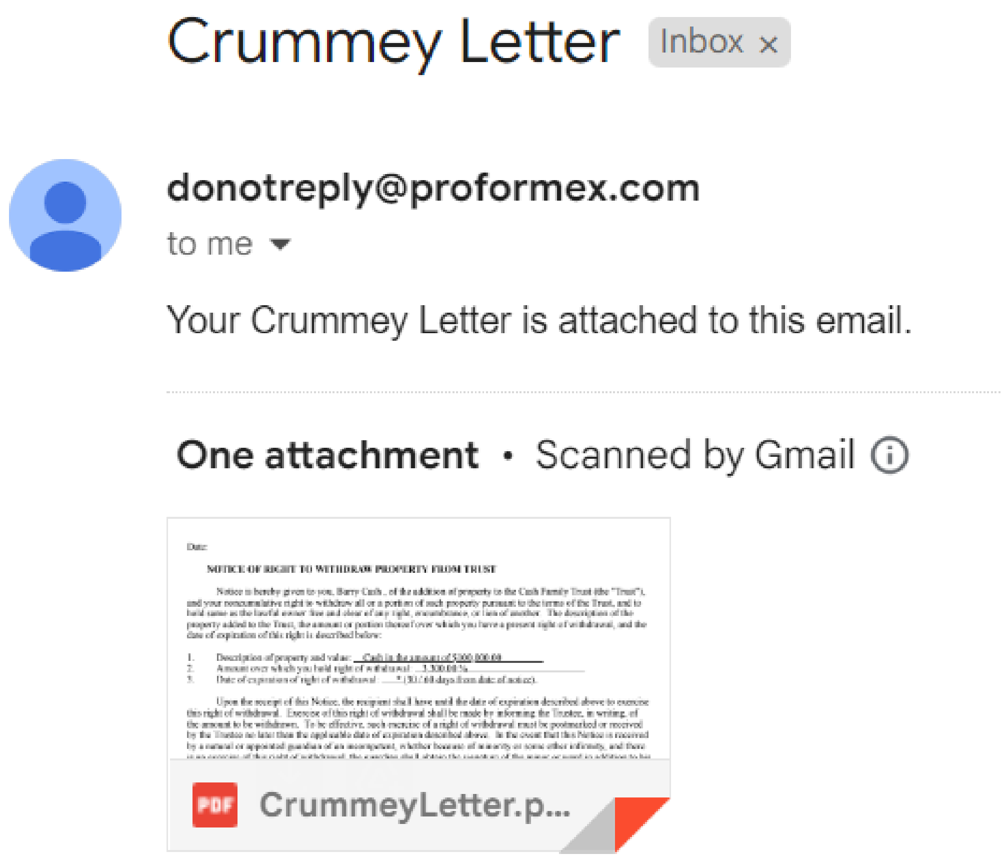
6. Click **Confirm** to send



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

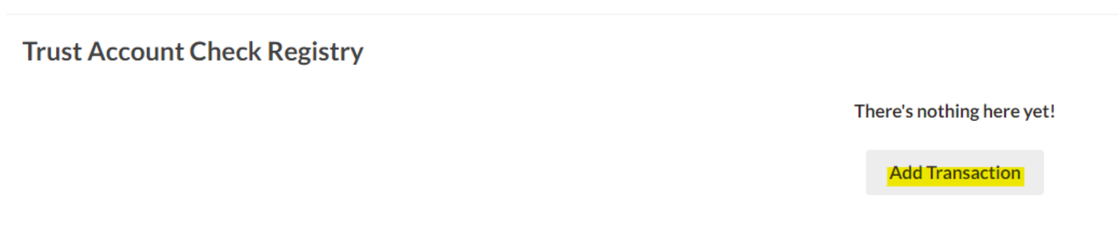


Please note the email will be sent from "**donotreply@proformex.com**"
Example from Gmail:

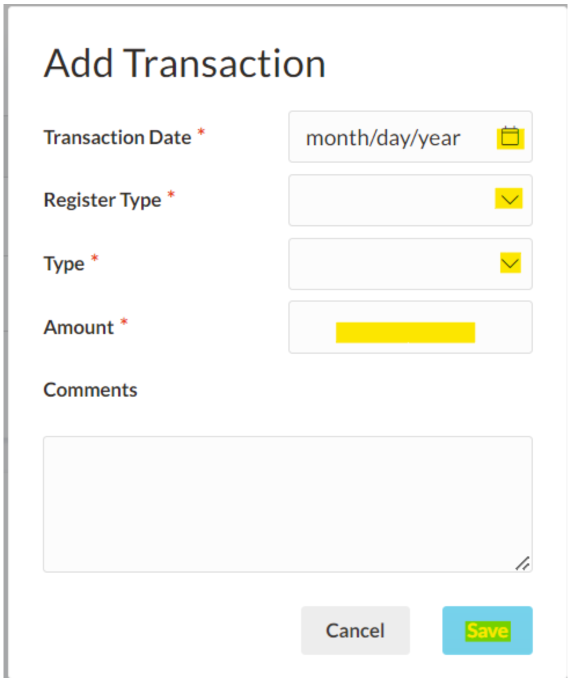


How to add a transaction to the Trust Account Check Registry

1. On the Crummey Management page, click **Add Transaction**



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

Add Transaction

Search

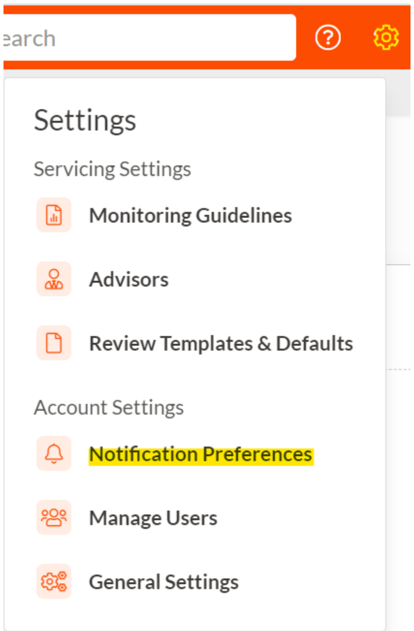
Date	Description	Debit	Credit	Balance
05/04/2024	test	$0.00	$5,000.00	$10,000.00
05/03/2024	--	$0.00	$5,000.00	$5,000.00

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.