

Trust Management

CAS 360 Education Week

Empowering professionals to automate workflows and efficiently manage company compliance.



Housekeeping

Questions during the Webinar?

All attendees in listen only mode. The Q&A window allows you to ask questions to BGL both during and after the webinar.

1. Click Q&A to open the Q&A window. You can move this window around your screen.
2. Type your question into the Q&A box.
3. Click Send.

The webinar will be recorded

The webinar will be recorded and posted on the BGL Community. All registered attendees will also receive an email with the link to the recording.

CAS 360 Education Week

- Unlock Digital Signing in CAS 360 – BGL Community
- Are you ready for Director IDs? – BGL Community
- Quick & easy template customisation – BGL Community.
- **Streamline your Trust Management**
- Streamline your Annual Review workflow
- Boost your Productivity with automated document, debt reminders & more!
- Discover company registrations & purchasing constitutions
- Commonly prepared forms in CAS 360



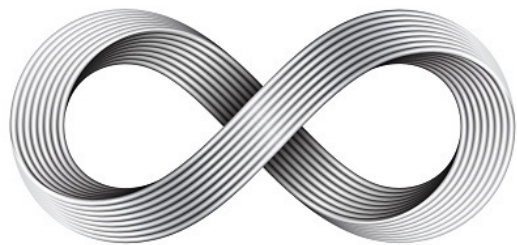
Agenda

- Add a Trust
- Create Trust Relationships
- Manage Unitholders
- Distribution Statements
- Create Trust events
- Create supporting documents



Licensing

Users can add an unlimited number of trusts in CAS 360 as trusts are NOT counted towards your company subscription numbers





SimpleInvest360

Automated CGT Portfolio Solution for Individuals, Trusts & Companies

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Thank You!