



Cloud-based software that simplifies the creation and management of trusts and companies, enhancing the service you provide to your clients while reducing both cost and risk.

CCH Entities is everything you need to manage your trust and company administration effectively and competently. One place, multiple functionality.



Trust Manager

Trust Manager makes the collection and management of trust data simple and streamlines and centralises processes and keep on top of legislation changes.

Fully customisable to suit your practice and client needs, it has been created in collaboration with users and leading trust specialists to enhance the service you provide to your clients, and to improve the overall profitability of your practice.

- ✓ Significantly minimises risk associated with trusts management and compliance
- ✓ Improves productivity which saving time and money
- ✓ Every document and record related to your trust in one place
- ✓ Developed in close collaboration with users
- ✓ Content is maintained by a leading NZ trust specialist practitioners and legislative changes and case precedents are monitored constantly, to ensure timely and considered amendments to deeds and documents
- ✓ History – CCH has been providing trust management software and content for more than 20 years



Expert Content

Trust Manager comes complete with a comprehensive collection of practical trust documents, templates and other resources developed by leading trust specialists, and if your firm already has a collection of precedents and documents that you would like to continue using, they can be easily set up in Trust Manager to merge with your trust data.



People Register

A register of each person associated with the trust and their roles and responsibilities.



Documents

Trust Manager has a comprehensive collection of over 130 practical trust documents, templates, precedents and workflows. Legislative changes and case precedents are monitored to ensure timely and well-considered amendments to deeds and documents.



Procedural Workflows

For expert practical guidance, use one of our 50+ procedural workflows, covering all the key events in a trust's life cycle.



Add completed documents

Pre-existing completed precedents and documents can also be attached to the relevant trust.



Assets

Record all the trust assets, liabilities and loans between parties.



Gifting Accounts

Gifting accounts can be set up for each person who has made advances to a trust.



Company Manager

A cost-effective and efficient tool for anyone involved with the administration of multiple companies and limited partnerships. Designed to cover the key activities in a New Zealand company's life, from incorporation, adopting a constitution, transfer and issuance of shares, annual general meetings through to liquidation and removal from register. Company Manager simplifies the compliance process to ensure annual returns are filed on time, and other regular company activities are appropriately managed with an easy to navigate interface.

NZCO Connector & AR Connector

Companies information is directly imported from NZ Companies Office including Company details, shareholder/holding details, annual return date, and directors details. File the AR and update director's details directly to NZ Companies Office. Submitting Annual Returns via the Company Manager module reduces the AR filing fee by \$4.

Company Manager is a cost-effective and efficient tool for anyone involved with the administration of multiple companies and limited partnerships.



Shares

Transfer and issue shares and create all associated documentation.



Documents

Create documents from a selection of more than 300 templates, including procedures and online letters, minutes, resolutions, certificates, reports, share register, directors register, company constitution and AGM documents. The document suite has a full range of topic headings and each contains the necessary forms, detailed practical guidance covering all the key events in a company's life cycle.



Procedural Workflows

For expert practical guidance, use one of our 60+ procedural workflows, covering all the key events in a company's lifecycle.



Manage information

Assign responsibility for annual returns, record directors nationality, place of residence, place and date of birth and director's interests.



Registers

Create and maintain registers including Register of Directors, Register of Directors Interests and Share Register.

CCH Entities

Accurate and safe document and data management, accessible from anywhere, on any device, securely based in Microsoft Azure.



User Portal

Optional user portal for your clients – switch on or off as per your preference. Your clients can view or download documents related to their company or trust in a secure online environment. The portal is customisable so you can personalise with your own company logo.

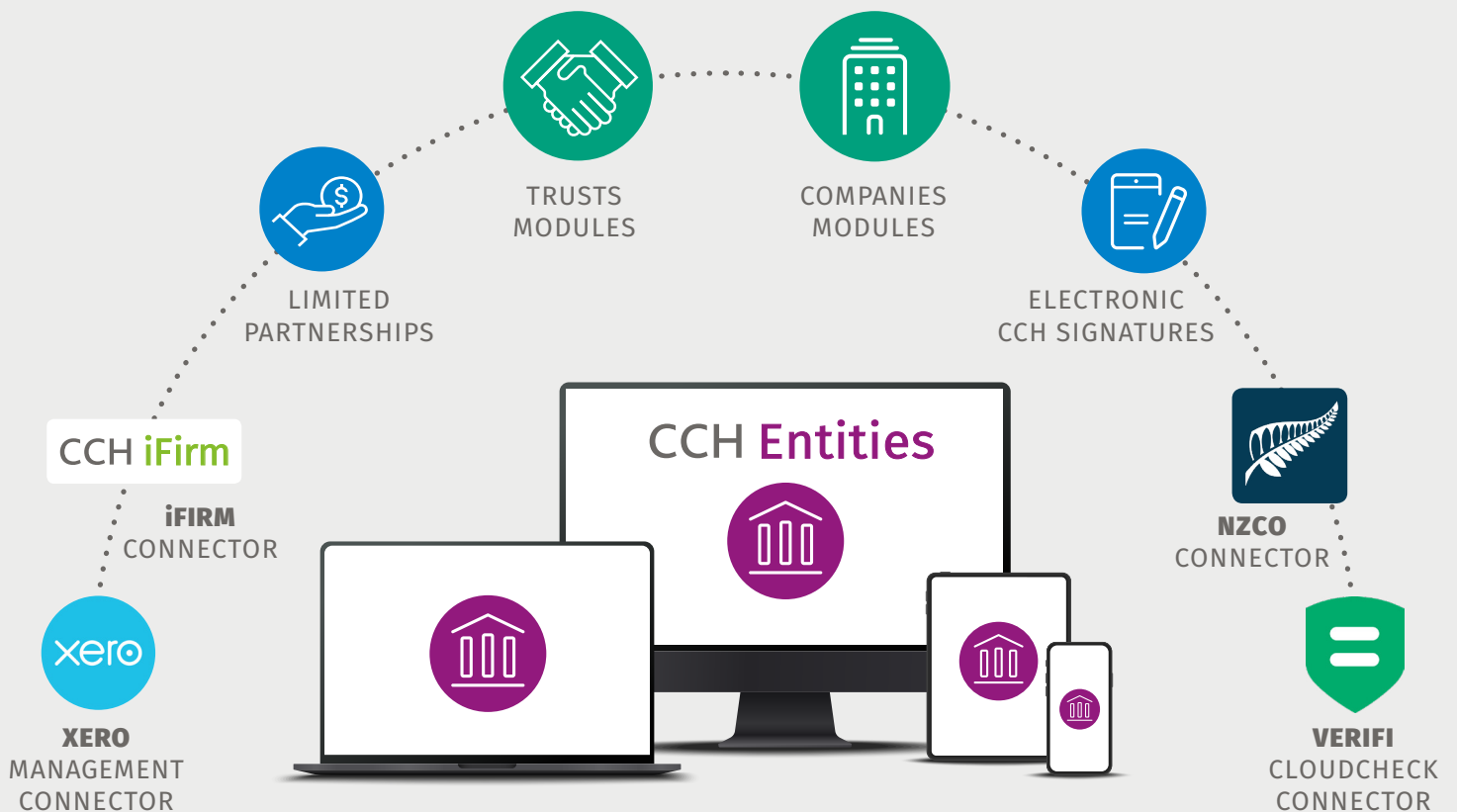


Electronic ID Verification

Integrated access to Cloudcheck, a service from Verifi Identity Services which verifies the identity of your clients for AML/CFT purposes in seconds using Australian and NZ data sources and global watchlists.

AML/CDD Admin

- ✓ Capture and report AML/CDD information.
- ✓ Manage tasks with an Outlook interface
- ✓ Online Signatures with CCH Signatures
- ✓ Document Creator
- ✓ Workflow Creator
- ✓ Easy to use dashboard and navigation
- ✓ Report suite



Trust Manager and Company Manager connect and integrate with external interfaces seamlessly and process all your entity administration in one place.

For more information about CCH Entities please contact us:

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wolterskluwer.co.nz/cch-entities

ABOUT WOLTERS KLUWER ASIA-PACIFIC

Wolters Kluwer enables legal, tax and finance professionals to be more effective and efficient. We provide information, software, and services that deliver vital insights, intelligent tools, and the guidance of subject-matter experts. With the integrity and accuracy of over 45 years' experience in Australia and New Zealand, and over 175 years internationally, Wolters Kluwer is lifting the standard in software, knowledge, tools and education.