

# CCH Entities™

**Everything you need to manage  
your trust and company administration  
effectively and competently.**

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.





---

# Trust Manager

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
- ✓ Streamline workflows to save time and money
- ✓ Every document and record related to your trust in one place
- ✓ Developed in close collaboration with users
- ✓ Up to date content, 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.



## Templates

Templates created by trusted experts can be customised to streamline and automate documentation.



## Procedural Workflows

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



## Document Storage

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

# 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 & AR Integration

Hassle-free onboarding process, streamlined to update changes of company information to NZCO. Real time watchlists to alert you to any changes made at NZCO.

Electronic filing of one or bulk annual returns at a discounted filing fee.



### Share Management

Administration of shares and updates to NZCO.



### Documents

Create documents using your own templates or from our extensive selection, including procedures, minutes, resolutions, reports, and company constitutions. The document suite has a full range of topic headings, and each contains the necessary forms and detailed practical guidance covering all the key events in a company's lifecycle.



### Procedural Workflows

For expert practical guidance, use one of our extensive range of 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.



### Health Checks

The Health Check view will highlight any potential issues with your company record, for example, missing information, unfinished checklists, or overdue tasks.



# CCH Entities

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

## Features

- ✓ AML/CDD requirements for your clients companies and Trusts
- ✓ Manage tasks with an Outlook interface
- ✓ Digital signatures with CCH Signatures
- ✓ Document Creator
- ✓ Workflow Creator
- ✓ Easy to use dashboard and navigation
- ✓ Report suite



### Client Portal

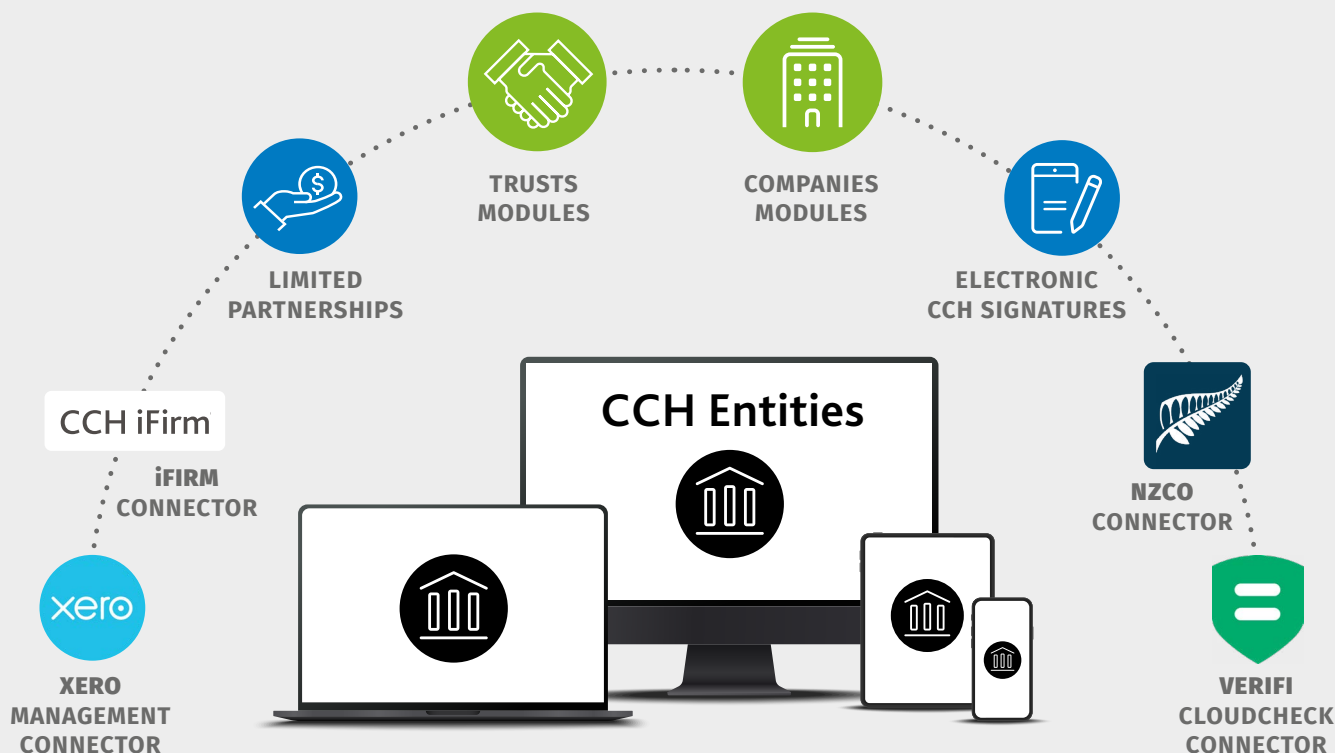
Optional client portal – your clients can view or download documents related to their company or trust in a secure online environment. The portal is customisable so you can personalise it with your company logo.



### 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.

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



---

## CONTACT US

For more information about CCH Entities please contact us:

Phone: 0800 500 224

[NZ-Support@wolterskluwer.com](mailto:NZ-Support@wolterskluwer.com)

[wolterskluwer.co.nz/cch-entities](http://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.