Date

(*Trustee name)*

*(Trustee address 1 )*

*(Trustee address 2 )*

*(Trustee address 3* )

Dear (*trustee name*)

Re: (*name of trust*)

You will be aware that there are multiple professional parties, including us involved in the administration of (*name of trust*).

Each of the professional advisors and the trustees have important roles to play to ensure the trust is well managed and able to achieve its’ purpose.

Currently each party tends to each hold their own trusts records. This can be inefficient, as it means one party may need to request information from another, or provide it, with the trust bearing the cost of that duplication. Also, sometimes each party’s records are documented or dealt with differently which can cause confusion and waste time in being resolved.

We use a software product called Connectworks to assist us to manage trusts. It offers the capability to have other parties involved and access all the records for each trust and allows the sharing of information and documents for the other parties involved to see. This is much like the way two people from a company or family can access online banking for a single account.

We’ve spoken to (*name of other professional/ professional firm involved*) who we note is also an advisor to the (*name of trust*) and they are interested in having access to your trust records we hold.

You also might like to have access to Connectworks if you wish to see what records we hold for you. It’s good practice for yourself as a trustee to have easy access to all trusts’ records. You could engage in discussions with the other parties involved using the software about trust activities, upload any documents or receipts relating to the trust that you may acquire, approve resolutions, sign documents and more.

Please advise which, if any, of the following options you would like to consider

1. Add (*name of other professional/ professional firm involved*) to our Connectworks subscription at $40 per annum + GST [ ] (n.b. This is on the basis of upgrading from unlinked at $25 to 2-party at $65. If the subscription is currently on Unlinked with Signing at $35, the cost to upgrade will be $30)
2. Add both (*name of other professional/ professional firm involved)* and yourself to our Connectworks subscription at $73 per annum + GST [ ] (n.b. This is on the basis of upgrading from unlinked at $25 to Unlimited at $98. If the subscription is currently on Unlinked with Signing at $35, the cost to upgrade will be $88)

Please feel free to get in touch if you’d like to discuss any aspect of this in more detail.

Regards

*(your name)*

*(title)*