

Online Trust Registration USER GUIDE



Online Trust Registration USER GUIDE

Welcome to the Nunn Hayward Online Trust Registration portal. Here are some simple instructions of how to use the portal.

Confirmation and passwords

Once you have signed up to the Trust Registration portal, you will receive the following email.

Dear NAME,

Thank you for joining our new Trust Registration online service.

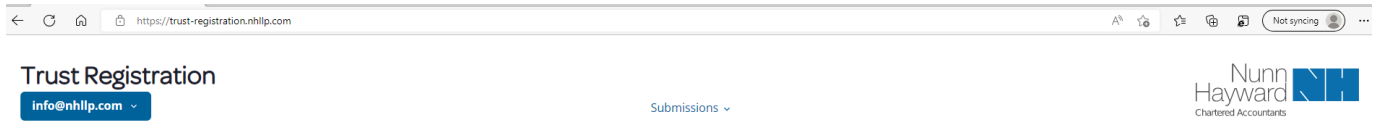
To access this, please go to <https://trust-registration.nhllp.com> to get started.

Your temporary password is **XXX-XXX-XXX-XXX**. We strongly recommend updating your password as soon as possible.

If you believe you have received this email in error, please contact us.

Best regards,
Tim Gurung

Click on the link and this will take you to the following screen



Welcome TEST USER

[Create new submission](#) [Continue an existing submission](#)

We would advise you to change your password immediately. You can do this by clicking on button shown below, you will find this in the top left corner of the web page.

Trust Registration

[info@nhllp.com](#) ▾

[Change Password](#)
[Logout](#)

Click **Change Password**, you will then be able to update your password.

Current password: [Show](#)

New password: [Show](#)

Confirm new password: [Show](#)

[Update password](#)

Update Password and record this somewhere safe.

Online Trust Registration

USER GUIDE

Adding a new trust

Click on the **Create new submission** button to start.

Submissions ▾

Welcome TEST USER

Create new submission

Continue an existing submission

The next screen is a reminder of the documentations you may require to complete your submission. Click **Start**.

Submissions ▾

New Submission

Before we begin please make sure you have the following documents available:

- ✓ Trust Deeds
- ✓ Wills
- ✓ Trustee details or passports
- ✓ Any other relevant documents

Start

You will need to give your submission a name, we would recommend using the clients name or something relevant to the client so that it is easily identifiable.

Submissions ▾

Please provide a name for this submission

It will help you find this submission later

Name:

CLIENT NAME

Next

Online Trust Registration

USER GUIDE

Select the type of trust. This will ensure you are only asked questions that are relevant to this type of trust.

Submissions ▾

Trust Details

What type of Trust do you have?

Express Trust

Will Trust

For questions where there may be multiple responses you can add additional entries, see example below.

Submissions ▾

Assets

Please list details of assets settled in the trust

1: [New](#)   

Date: Value when settled: Current value:

Other details:

Number 1 has blank fields: Date, Value when settled, Current value

Previous

Next

Once you have completed the first entry you can press the  to add additional details.

Saving and submitting your submission

All responses are automatically saved as they are entered. Therefore if you need to step away from your submission you can do so and all your question responses will be storied within our system.

To go back to your submission simply click on the submission tab at the top and you can revisit and complete your questions.

Submissions ▾

NAME	SUBMITTED?	CREATED BY	CREATED AT	LAST UPDATED BY	LAST UPDATED AT
CLIENT NAME	N	TEST USER (info@nhllp.com)	6 July 2022 at 13:25:00	TEST USER (info@nhllp.com)	6 July 2022 at 13:25:00

View

Online Trust Registration

USER GUIDE

Similarly, if you have multiple submissions within the system you can review them and decide which ones you wish to progress..

Submissions ▾

NAME	SUBMITTED?	CREATED BY	CREATED AT	LAST UPDATED BY	LAST UPDATED AT	
CLIENT NAME TWO	Y	TEST USER (info@nhllp.com)	6 July 2022 at 13:28:27	TEST USER (info@nhllp.com)	6 July 2022 at 13:28:27	View
CLIENT NAME	N	TEST USER (info@nhllp.com)	6 July 2022 at 13:25:00	TEST USER (info@nhllp.com)	6 July 2022 at 13:25:00	View

When you get to the end of your submission you will be asked to upload any relevant documents. The screen looks like this (this is a Will Trust example).

Submissions ▾

Will Upload

Please upload Trust Deeds, passports, or any other relevant documents

[Select files](#)

[Previous](#)
[Finish](#)

Click **Select files**. The following screen will show all the files that you have uploaded. Once you have all the files showing that you need, click **Upload selected files**.

Submissions ▾

Trust Deeds Upload

Please upload Trust Deeds, passports, or any other relevant documents

Selected files:

1: Florence passport 1.jpg ✕

[Select files](#)
[Upload Selected Files](#)

[Previous](#)
[Finish](#)

Online Trust Registration USER GUIDE


You will then see the following. Click **Finish** to submit your submission.

Submissions ▾

Trust Deeds Upload

Please upload Trust Deeds, passports, or any other relevant documents

Uploaded:

Florence passport 1.jpg 

[Select files](#)

Previous
Finish

You can now review all of your answers and edit them if needed.

Submissions ▾

This form is complete but is not yet submitted.
Please review your answers as they cannot be changed once submitted.
When you are ready, please click the submit button at the bottom of the page.

Trust Details

What type of Trust do you have? [Edit](#)

Will Trust

What is the full name of the Trust? [Edit](#)

When you are happy that all your responses are correct. You can press **Submit**. Once you have submitted all of your responses you cannot amend or change any of your answers.

Did the Trust had any taxable income or gains in the previous tax years? [Edit](#)

No

Will Upload

Please upload Trust Deeds, passports, or any other relevant documents [Edit](#)

uploaded

[Submit](#)

To confirm your submission has been received, you will receive this message.

Submissions ▾

This form has been submitted and can no longer be edited