

Water Cooler



www.abbit.biz

Navigating Abbit's Web Site (Client Login)

For the next several *Water Coolers* we will be assisting you with maneuvering through our web site with ease. The following instructions will take you step by step through **your login process**:

1. To Login go to our website at: www.abbit.biz
The spelling of *abbit* and *biz* must be exact.
2. There will be three choices.
Click on: **MASTER ESCROW TRUST**
3. The screen changes. Notice the blue across the top of your screen. Under that is a green line and under that is a yellow line. In the yellow line are six choices. Click on the second choice, **Client Login**.
4. You are now on another page of our site. Once you have read these instructions, please click on: **Login Page**.
5. Your login name is:
the first five letters of your funeral home/ cemetery name **plus** your 3-5 character/ digit Abbit code (no spaces). Your code is the number on your statements and the number you place on your deposit forms.
6. Your password is:
only the numbers used in your login. Use at least 3 numbers. If your code is only 1 or 2 numbers, please insert 0 in front of the number. Then click the **Login** button on the right.
7. You are now in the Abbit Management Preened System. Your choices here are:
View/Print Month Statements
Client Information
Time Payment Calculation Screen
Change Your Login and Password
View Your Preened Profile

(continued on the next column)

It may take a minute or two to pull up the information so please wait and it will pop up on your screen.

If you have any questions, please call us at 1-800-232-2179.

Next month we will discuss viewing , reading, and printing your monthly statements.

Sipping with Sandy . . .

at the Water Cooler

How to Process a Transfer to Another Provider

Occasionally, one of your clients or a member of their family may request a transfer to a different provider. Whether it is before death or after death, the cancellation process begins with the Provider who currently holds the contract. The Escrow Agent requires instructions on a "Memo Cancellation/Partial Withdrawal" form authorizing Abbit Management to release the funds as requested. Each situation is unique, so please call if you are uncertain of the appropriate procedure. Please do not fax our forms to the provider who is receiving the transfer for them to fill out. Permission for release of funds must come from the **existing contract provider**. This gives you the opportunity to review the contract and request your cancellation fee if disclosed properly.

Effective June 1, 2009

**Irrevocable Funeral Trust Contract Limit
will be \$11,450**

**Funeral Insurance Cap Limit will be
\$9,450**