

Water Cooler



www.abbit.biz

Navigating Abbit's Web Site (Client Information)

June's *Water Cooler* covered "Client Login". July covered "View/Print Month Statements". Now we will present the process for obtaining "Client Information". The advantage of going directly to the Client Information section rather than the monthly statements is that you will see **ALL of the contracts** you have for an individual together in one place because they are listed in alphabetical order.

After you have completed your login, you have 5 options:

1. Click on the second option: "Client Information". There are 8 columns. The second column is the last name of the **Beneficiary**, listed in alphabetical order according to their last name, followed by their first name and middle initial. Next is a reference number followed by the **Purchaser's** last name, first name and middle initial.
2. Find the name of the beneficiary you are wanting information on and in the first column click on "**Select**".
3. Now you are viewing the information for one of the contracts and you may choose:
4. "**Client YTD Statement**" is a current Account Statement or
5. "**Termination Amount**" provides the termination amount as of today.
6. "**See Assoc. Contracts**" lists all of the accounts this individual has with you. For clients who hold more than one contract you may access the information for each of their separate accounts in this area.

(next month: "Time Payment Calculation Screen")

Sipping with Sandy . . .

at the Water Cooler

The deposit form is one of the most critical documents needed when setting up your contracts correctly on the system. This is what we input from. It is important to write clearly and legibly. Remember to fill in **all** necessary blanks with the correct information as this information is reflected on your monthly statement, your client's funds acknowledgement and all other reports that are generated by the pre-need system.

It is crucial that you select your choice of trust on your deposit forms for new contracts. If a trust is not selected, the funds will be placed in the default trust which is the "Bond Tax Required Trust".

If you are not using contracts produced and provided by Abbit Management, please remember to include a W-9 form with your client's signature. This is where they are certifying that they have indeed given you their correct social security number. Your escrow agent requires this form in your clients file no matter what trust has been selected. If you need a supply of W-9 forms, they are available via Abbit Management website www.abbit.biz or you may call us for a supply.

Finally, remember to sign the authorized provider signature line at the bottom of the deposit form.

Thank you for your consideration to this matter!

MARK YOUR CALENDAR
Our Office will be closed
in observance of
Labor Day
Monday, September 7th

