

Trust subscription plans

Unlimited - \$98 per trust per annum

Best for active trusts with all parties engaged.

Unlimited access by all appropriate parties, including every staff member of accounting, law or trust management firm and non-professional trustees. Includes shareable CDD against natural persons involved.

2-party - \$65 per trust per annum

Best for when only 2 parties are engaged. e.g. accounting and law firm, or one firm with contact trustee.

Access covers everyone within the professional firm(s) and contact trustee. Other trustees can approve and sign online, or manually and then upload. Includes shareable CDD against natural persons involved.

Unlinked - \$25 per trust per annum

Best for where there is a single professional and trustee are not online. Internal use by professional firm-only with no client access. Includes AML/CFT functionality. No document sharing, signing or oversight of other parties activity.

Unlinked with signing - \$35 per trust per annum

As above, but with clients and all staff of other professional firms able to sign documents and approve resolutions-only.

Corporate trustee companies – no charge

Ability to manage your corporate trustee companies, where the associated trust also uses Connectworks. Includes importing information from Companies Office, managing shareholding, precedents, documents and director approvals and signing at no charge. A reduced Companies Office annual return fee applies.

Prices exclude GST, subscriptions payable annually in advance. One month no-charge loading period given from time of import/loading. Client ID verifications are charged additionally - \$5 for a combined NZ Driver Licence, proof of address, PEP and sanctions check.

- Select the plan that's right for each trust you manage. No requirement to use a single plan for your firm.
- Transfer between plans yourself at any time without penalties.
- **Archive plan.** \$75 for 10 years. View under the list of trusts you manage. Can change back to an active plan if ever required. Everything secure and easily searchable.
- **AML/CFT-only plan.** \$5 per trust per annum. Excludes ID checks via Connectworks
- No set-up cost.
- No charges for support. support.connectworks.com knowledgebase, online and email help, plus an 0800 number to a real person based in New Zealand.