*<Client first name> <Client last name>*

*<Company>*

*<Postal address 1>*

*<Postal address 2>*

*<City> <Postcode>*

*<Date>*

Dear *<Client first name>,*

Full access to Connectworks

[*Your firm*] has been using a NZ software product, Connectworks, for managing all its <*trusts and/or trustee companies and/or companies*> since *<time>.*

As well as the ability to use it for [*your firm*] internally, there is also the scope to connect other parties involved in each <*trust and/or trustee company and/or company*> through the software. This is either by them being able to (1) sign-only, or (2) by having full access to all the trusts’ information.

We would like to upgrade a number of Connectworks subscriptions to option, (2) in order to invite (other firm name) to have full access to the trust, which includes the ability to sign. Trustee clients will also be able to access it and sign.

As well as the signing functionality, this will also allow you to generate and view resolutions and discussions in the <*trust and/or trustee company and/or company*>’ minute book, download precedents from Connectworks’ extensive precedent library, share and store documents with other parties involved in the <*trust and/or trustee company and/or company*>, and access the <*trust and/or trustee company and/or company*>’ asset and liability management system and more.

Full training would be provided by Connectworks.

The signing can be by either (a) signing on-screen or (b) by having a signature inserted and verifying the signing or (c) by printing, signing, scanning then uploading. Different users can sign using different methods and Connectworks even supports different signatories using different signing methods on a single document. You will be able to see what has and hasn’t been signed.

There is also the ability to upload a paper document as signed, for signatories who don’t wish to sign electronically and the witnessing of digital signatures is also supported.

This paper outlines how the methods used comply with requirements of the Electronic Transactions Act 2002:

<http://www.connectworks.com/nz/connectworks-electronic-signatures-and-the-law>

All valid signatures produce a signing certificate verifying that the above requirements have been met.

We believe that by [*other Firm Name*] being able to access and use the minute book, store and share documents, use the precedents and assets and liabilities manager and well as both yourselves and clients signing digitally, it will improve the efficiency and lower the cost of managing the <*trust and/or trustee company and/or company*>.

[*Your firm*] is managing the cost of the Connectworks subscriptions, so there is no additional cost (in fact, significant savings) for [*other firm name*] by working this way.

We would like to upgrade the following Connectworks subscriptions we share with [*other firm name*] to support your firm having access:

*<entity name>*

*<entity name>*

*<entity name>*

*<entity name>*

*<entity name>*

*<entity name>*

*<entity name>*

If you have any questions or concerns, please either let us know, or you can contact Connectworks on support@connectworks.com

Regards,

*<Name>*

*<Title>*