



Your Guide to
**Deposits, Statements,
Updating Account Information,
and Disbursements**

Introduction

The Arc of Indiana Master Trust is proud to present our new trust administration software, INtrust!

INtrust is a great tool to keep up to date with trust accounts. You are able to see real-time transactions and balances, submit disbursement requests, submit electronic deposits, change account information and much more! We hope you find INTrust helpful in obtaining the information you need.

INtrust Launch Reminders:

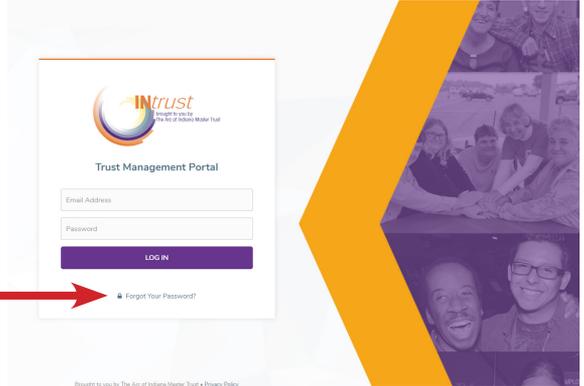
- You can access INtrust through our website at thearctrust.org. Click on the orange “Access Your Account” button on the upper right hand corner of the page. This will take you to the login page for INtrust. You are also welcome to go to the login page directly, intrust.thearctrust.org.
- You will receive an email from the INtrust system to create a password. The password requirements are more stringent including length and the use of different types of characters.
- You will be able to have confirmation email and text alerts sent for certain actions including, deposits, disbursement approval/denial, joinder agreement submission and reminders to check the information on the beneficiary account.
- We will no longer be providing a mailing every year to ensure the information on the account is up to date. We will depend on the key people to inform the trust when there are address changes, benefit changes or other changes to the account.
- INtrust is mobile friendly! You can perform all functions on your smart phone or tablet.
- If you have any questions, please contact your account manager.

Logging On

Enter your email and password

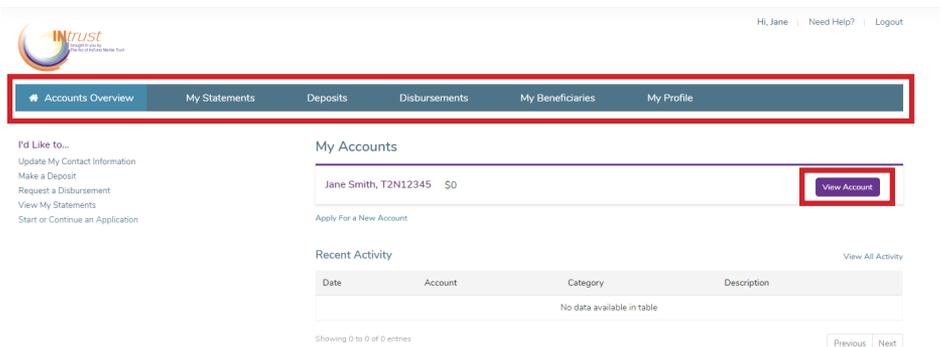
Please note this is not the same password as the old system

If you need help in remembering your password, please click on **Forgot Your Password?** To help you through the process of resetting your password.



Overview

Below is the landing page you will see after logging in. If you are a key person for multiple beneficiaries, they will all be listed under My Accounts. From this page, you are able to update your information, download statements, make a deposit, make a disbursement request, start a new application and view beneficiary information. Recent Activity will include all activity from all accounts. You can view each section by selecting the action from the blue top banner. You may also select **View Account** next to the beneficiary's name to see more details on their account. It will give you real time balances with pending disbursements, key people, statement preferences, account manager information and remaindermen information.



Statements

You are able to generate statements at any time. From the Account drop down list, select the beneficiary. Then select the date range and Generate Statement. This will generate a PDF to download. INtrust will save all of the statements you have requested and you may re-download them at anytime.



Hi, Jane | Need Help? | Logout

- Accounts Overview
- My Statements**
- Deposits
- Disbursements
- My Beneficiaries
- My Profile

View All Accounts

Account Balances
Jane Smith, T2N12345
Available Balance: \$0



Always see account balances on the left side

Statements

Select an Account and Date Range to Generate a Statement

Account
Jane Smith, T2N12345

Start Date: 12/19/2018 End Date: 12/19/2018

Generate Statement

Recent Statements

| Date Range | Account | Actions |
|----------------------------|---------|---------|
| No data available in table | | |

Showing 0 to 0 of 0 entries

Previous Next

Deposits

You are able to make a deposit through a credit card or eCheck. Please select the beneficiary in the drop down and fill out the appropriate form. You will get an email confirmation once the deposit has been submitted.



Hi, Jane | Need Help? | Logout

- Accounts Overview
- My Statements
- Deposits**
- Disbursements
- My Beneficiaries
- My Profile

Make a Deposit
View Scheduled Deposits

Account Balances
Jane Smith, T2N12345
Available Balance: \$0

Make a Deposit

Select an Account to Make a Deposit

Deposit To
Jane Smith, T2N12345

Make a Deposit

Deposit Method
Credit Card eCheck

Deposit Amount

Credit Card Number
0000 0000 0000 0000

Expiration CVV
MM YY 000

Updating Account Information

If you need to change a key person on the account, you can submit that request here. The account manager will review the request. You will receive a confirmation email when your request has been approved.

If you need to change a remaindermen on the account, you will need to contact your account manager directly.

Other Key People On This Account

Jane Smith - Primary Key

- Request to Add a Key Person
- Request to Remove a Key Person

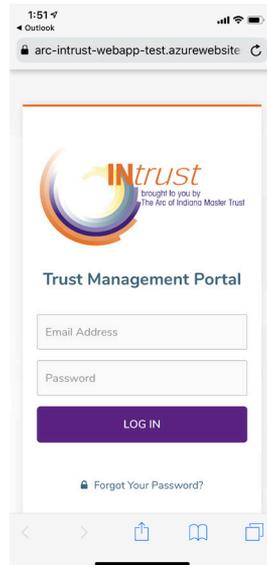
Remainderman On This Account

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[View Remainderman Special Instructions](#)

[Need to add or remove a remainderman?](#)

**We are now
mobile friendly!**

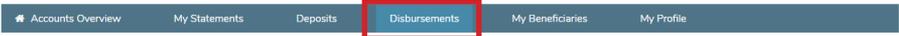


Disbursements

In this section, you are able to submit disbursement requests. Select the appropriate beneficiary from the drop down. Once the disbursement has been entered and submitted to the account manager, if there is an issue with the request, the account manager will send it back to you with a request for more information. You will receive an email notification if this happens.



Home | Help | Logout



Request New Disbursement
View Requested Disbursements

Account Balances
Jane Smith, T2N12345
Available Balance: 50

Request New Disbursement

Select an Account to Request a Disbursement

Account
Jane Smith, T2N12345

Disbursement Request Form

Is This a Reimbursement?

Yes No

Reason For Request

Disbursements - New Features

For those who need assistance in adding up the total of receipts acceptable for reimbursement, you may click the Calculate the total for me box. That will alert the account manager to total your receipts.

Is This a Reimbursement?
 Yes No

Reason For Request

Amount of Request
\$ 0.00

Calculate the total for me.

Vendor Account Number

Receipts & Supporting Documentation
 Upload Receipts Upload Other Documentation

Make Check Payable To

*Please note we cannot make checks payable to beneficiaries

Mail Check To
Street Address Line One
Street Address Line Two

You can also upload documentation and receipts regarding the request.

Make Check Payable To

Street Address Line One

Street Address Line Two

City

Select State

Zip

*Please note we cannot make checks payable to beneficiaries

Mail Check To

Disbursement Frequency

One Time Recurring

Scheduled Date

12/19/2018

By Checking This Box I Attest That the Disbursement Requested is for the Sole Benefit of the Beneficiary

Submit Request

You can schedule bills and other requests for recurring payments. You will need to work with the account manager to see what documentation they will need for future disbursements.

Contact Us

If you have any questions or need assistance, please do not hesitate to contact your account manager. Call 317.977.2375 or 800.382.9100

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