**Sending 6 monthly balances for LD Client Account**

* Every 6 months (for end Sept and end of March) we send a balance update for each of the individuals holding money in the shared account.
* Wait until the recent bank statement has been received so that the interest can be allocated.
* Set print area to show transactions for the previous 6 months.
* Select print to PDF and save as initials and date.

Updated 14/03/2023