

# Client Trust Registration Form

In order to register your Trust with HM Revenue & Customs (HMRC) using their online Trust Registration Service (TRS) we need some information regarding you and your Trust.

Please be assured your details will be kept entirely confidential. Our full privacy policy can be viewed here [www.mogersdrewett.com/privacy-policy](http://www.mogersdrewett.com/privacy-policy) and paper copies are available on request.

## About you

|  |  |
|--|--|
| Title  |  |
| Name   |  |
| Surname  |  |
| Date of Birth  |  |
| Address  |  |
| Postcode   |  |
| Phone Number   |  |
| National Insurance Number  |  |
| Passport Number (Please supply a certified copy if not a UK citizen) |  |
| Nationality  |  |
| Country of Residence   |  |

## About the Trust

|   |   |
|---|---|
| Name of the Trust   |   |
| Type of Trust   | <p><b>Please tick relevant trust</b></p> <p> <input type="checkbox"/> Discretionary Trust             <input type="checkbox"/> Life Interest Trust         </p> <p> <input type="checkbox"/> Bare Trust             <input type="checkbox"/> Not known         </p> <p>Please supply a copy of the Trust document</p> |
| Date Trust created  |   |
| If your Trust has a Unique Taxpayer Reference Number (UTR), please enter it here. Please also enter details of the Trust's assets on page 8 of this form. (The UTR can be found on correspondence from HMRC). |   |



Please can each trustee supply the information requested below. If there are more than 4 trustees please use additional sheets.

| Trustee One   |  | Trustee Two   |  |
|---|--|---|--|
| Title   |  | Title   |  |
| Name  |  | Name  |  |
| Surname   |  | Surname   |  |
| Date of Birth   |  | Date of Birth   |  |
| Address   |  | Address   |  |
| Postcode  |  | Postcode  |  |
| Phone Number  |  | Phone Number  |  |
| Email   |  | Email   |  |
| National Insurance Number   |  | National Insurance Number   |  |
| Passport Number<br>(Please supply a certified copy if not a UK citizen) |  | Passport Number<br>(Please supply a certified copy if not a UK citizen) |  |
| Nationality   |  | Nationality   |  |
| Country of Residence  |  | Country of Residence  |  |
| Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> | Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |



| Trustee Three   |  | Trustee Four  |  |
|---|--|---|--|
| Title   |  | Title   |  |
| Name  |  | Name  |  |
| Surname   |  | Surname   |  |
| Date of Birth   |  | Date of Birth   |  |
| Address   |  | Address   |  |
| Postcode  |  | Postcode  |  |
| Phone Number  |  | Phone Number  |  |
| Email   |  | Email   |  |
| National Insurance Number   |  | National Insurance Number   |  |
| Passport Number<br>(Please supply a certified copy if not a UK citizen) |  | Passport Number<br>(Please supply a certified copy if not a UK citizen) |  |
| Nationality   |  | Nationality   |  |
| Country of Residence  |  | Country of Residence  |  |
| Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> | Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |



# The Settlor/s

| Settlor One   |  | Settlor Two   |  |
|---|--|---|--|
| Title   |  | Title   |  |
| Name  |  | Name  |  |
| Surname   |  | Surname   |  |
| Date of Birth   |  | Date of Birth   |  |
| Address   |  | Address   |  |
| Postcode  |  | Postcode  |  |
| Phone Number  |  | Phone Number  |  |
| National Insurance Number   |  | National Insurance Number   |  |
| Passport Number<br>(Please supply a certified copy if not a UK citizen) |  | Passport Number<br>(Please supply a certified copy if not a UK citizen) |  |
| Nationality   |  | Nationality   |  |
| Country of Residence  |  | Country of Residence  |  |

# The Beneficiaries

Please provide information about those benefiting from the Trust (Beneficiaries).

Please include Life Tenant – the beneficiary entitled to receive lifetime benefits from a Trust and Remainderman – the beneficiary who will receive trust assets after the Life Tenant has died. If beneficiaries are organisations please complete the organisation pages below.

If you have more than 2 beneficiaries please use additional sheets.

| Beneficiary One   |  | Beneficiary Two   |  |
|---|--|---|--|
| Title   |  | Title   |  |
| Name  |  | Name  |  |
| Surname   |  | Surname   |  |
| Date of Birth   |  | Date of Birth   |  |
| Address   |  | Address   |  |
| Postcode  |  | Postcode  |  |
| Phone Number  |  | Phone Number  |  |
| Email   |  | Email   |  |
| National Insurance Number   |  | National Insurance Number   |  |
| Passport Number<br>(Please supply a certified copy if not a UK citizen) |  | Passport Number<br>(Please supply a certified copy if not a UK citizen) |  |
| Nationality   |  | Nationality   |  |
| Country of Residence  |  | Country of Residence  |  |
| Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> | Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |



## The Beneficiaries

| Beneficiary Three   |  | Beneficiary Four  |  |
|---|--|---|--|
| Title   |  | Title   |  |
| Name  |  | Name  |  |
| Surname   |  | Surname   |  |
| Date of Birth   |  | Date of Birth   |  |
| Address   |  | Address   |  |
| Postcode  |  | Postcode  |  |
| Phone Number  |  | Phone Number  |  |
| Email   |  | Email   |  |
| National Insurance Number   |  | National Insurance Number   |  |
| Passport Number<br>(Please supply a certified copy if not a UK citizen) |  | Passport Number<br>(Please supply a certified copy if not a UK citizen) |  |
| Nationality   |  | Nationality   |  |
| Country of Residence  |  | Country of Residence  |  |
| Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> | Do they have mental capacity?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |

# Organisation Beneficiaries

## Organisation One

Organisation Name

Address

Postcode

Country of Residence

## Organisation Two

Organisation Name

Address

Postcode

Country of Residence



## The Trust's Assets

Only complete if your Trust has a UTR

Thank you please return the completed form to Mogers Drewett. Once we receive the form we will register the trust with HMRC and confirm when this is done.