



Trust Application Form

SECTION 1

NAME OF TRUST

Name of Trust	
☐ IV / Family Trust	☐ Other

SECTION 2

FOUNDER DETAILS

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
Postal Code			
Employer		Occupation	
Tax Number			
Origins of Funds			
Type of Assets to be Introduced			
Cell Number		Alternate Contact Number	
Email Address			

SECTION 3

TRUSTEES

Is the founder a trustee?	☐ yes ☐ no	Is there a co-trustee?	☐ yes ☐ no
		Is the founder a beneficiary?	☐ yes ☐ no

SECTION 4**TRUSTEE DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			

SECTION 5**TRUSTEE DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			

SECTION 6**BENEFICIARY 1 DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
Postal Code			
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			
Relationship to Founder			

SECTION 6**BENEFICIARY 2 DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			
Relationship to Founder			

SECTION 6**BENEFICIARY 3 DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
Postal Code			
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			
Relationship to Founder			

SECTION 6**BENEFICIARY 4 DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			
Relationship to Founder			

SECTION 7**PARENT/GUARDIAN DETAILS**

Full Name			
ID / Passport Number		Nationality	
Street Address			
	Postal Code		
Postal Address			
	Postal Code		
Employer		Occupation	
Tax Number			
Cell Number		Alternate Contact Number	
Email Address			
Next of Kin Contact Information			
Full Name			
Cell Number		Alternate Contact Number	
Email Address			

SECTION 8**BROKERS DETAILS**

Name of Broker			
Name of Business			
Telephone Number			
Street Address			
	Postal Code		
License Number			

SECTION 9**ADDITIONAL NOTES**

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SECTION 10**CLIENT SIGNATURE**

Full Name			
Signature		Date	

LIST OF REQUIRED DOCUMENTS

☐	Certified copy of ID or Passport in duplicate for all named parties to the Trust (certified within the last 2 months)
☐	Certified proof of address in duplicate of all named parties to the Trust (certified within the last 2 months)