

# Trust compliance.



## Trust information

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**Full name of Trust:**

**Date of creation:**

**Is this a taxable trust:**

**UTR if already registered with HMRC:**

**Correspondence address:**

Where the trust is administered from  
e.g. Harper Macleod LLP

**Adviser's details if not Harper Macleod LLP:**

**Type of Trust:**

(Discretionary, Bare, etc)

**Tax Residency of Trust:**

**Was a holdover claim submitted on creation:**      **Yes**                      **No**

**Beneficial Owners**

***Trustees, Settlers and Beneficiaries should now complete the individual details form.***

*Beneficiaries are only required to complete this form if they are named in the trust Deed or if they receive a distribution from the Trust (income or capital), please note that any changes must be declared within 30 days to HMRC. If the settlor is deceased, please provide a date of death.*

***Please complete the TRS - Trusts Assets Form to record the assets settled into the trust.***