

# Trust compliance.



## Individual details form for a settlor/trustees/beneficiaries

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**Name:**

**Capacity:**

(Settlor, Trustee Beneficiary)

**If you are a Trustee please  
confirm if you  
are the lead trustee:**

(the lead trustee will be required to sign the Trust tax return and receive correspondence from HMRC among other things).

**Address:**

**Email:**

**Date of Birth:**

**If this is a Will Trust please  
provide date of death of  
Settlor:**

**National Insurance No:**

(If a UK citizen)

If no National Insurance No.

**Passport No:**

(If a UK citizen)

**Country of residence:**

(last known where deceased)

**Country of nationality:**

**If you are the beneficiary of  
the Trust are you classed as  
a vulnerable person:**