



Request for drafting of an Inter Vivos Trust

Trust requirements

Name of trust _____

Important: All fields are compulsory

The following FICA documents must accompany the application

- Copies of the identity documents of the Founder, Trustee and Beneficiaries
- Proof of residential address (for example municipal account) of the Founder, Trustee and Beneficiaries
- *Where children live with their parents, a confirmation letter from the parent, accompanied by proof of residential address.

Note: Original certified copies of abovementioned documents must accompany the signed copy of the trust deed..

A. Particulars of Donor/Settlor/Founder

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Postal address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

B. Trust assets

Please indicate the types of assets as well as their respective values that will be transferred to the trust

Assets	Value



C. Particulars of trustees

Trustee 1

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Name of Trust _____

Trustee 2

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Trustee 3

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____



D. Right to appoint trustees

Which trustee must be given the right to appoint, during his/her lifetime, a new trustee or trustees in writing or in terms of his/her will in place of any trustee or trustees who may die or whose office is terminated?

Trustee 1 Trustee 2 Trustee 3 Any trustee who is a beneficiary

E. Particulars of Beneficiaries

Beneficiary 1

Income Capital Must provision be made for descendants? Yes No

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Relationship to settlor _____

Name of trust _____

Beneficiary 2

Income Capital Must provision be made for descendants? Yes No

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Relationship to settlor _____



Beneficiary 3

Income Capital Must provision be made for descendants? Yes No

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Relationship to settlor _____

Beneficiary 4

Income Capital Must provision be made for descendants? Yes No

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Full names and surname _____

Identity number _____ Occupation _____

Highest level of education _____

Postal address _____ Postal code _____

Residential address _____ Postal code _____

E mail address _____

Contact numbers: Telephone (Home) (_____) _____ Telephone (Work) (_____) _____ Cellphone _____

Relationship to settlor _____

F. Intestate heirs

The intestate heirs of which beneficiary must qualify as a trust beneficiary:

Beneficiary 1 Beneficiary 2 Beneficiary 3 Beneficiary 4

Name of trust _____



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Associates
Gerda Pretorius

G. Details of intermediary (compulsory)

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Name and surname _____

Intermediary Code _____

E mail address _____

Contact numbers: Telephone (Work) (_____) _____ Fax(Work) (_____) _____ Cellphone _____

H. Particulars of Specialist Financial Planner (if applicable)

Title: Mr Mrs Miss Ms Rev Dr Prof Adv Judge

Name and surname _____

Pay code _____

E mail address _____

Contact numbers: Telephone (Work) (_____) _____ Fax(Work) (_____) _____ Cellphone _____

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