



Establishment of Trust Questionnaire

Name you wish to call the Trust? (can be any name)	
Who is initially establishing this Trust? (known as the Settlers)	
Who are going to be the Trustees of the Trust? (It can be the Settlers alone or with an independent trustee)	
Who is going to have the power to appoint and remove trustees? (normally the Settlers in the first instance)	
Who are the Primary Beneficiaries of the Trust? (if any - normally the Settlers)	
Who are the Secondary Beneficiaries of the Trust? <ul style="list-style-type: none">• your children• grandchildren• step children• wives or partners of your children & grandchildren• charities No need to name them just write the class of beneficiaries as per above.	
Who are the Final Beneficiaries of the Trust?	

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<p>Provide details of each Property to be transferred into the Trust.</p>	
<p>What are your primary reasons for establishing this Trust?</p>	
<p>If you have current wills these will need to be updated to reflect the establishment of the trust, please email a copy through to us.</p>	