

**ALK**PROFESSIONAL
EXECUTORS &
FIDUCIARY SERVICES

TRUST APPLICATION

Name of Interviewer:

Telephone	()
Cell phone	
E-mail	
Institution	
Date	

Trust to be drafted in	Afrikaans		English	
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Name of Trust	
Type of Trust	
Purpose of the Trust	
Asset Location	
Bank & branch (where account will be opened)	

1. FOUNDER OF TRUST

Surname		Also Trustee	<input type="checkbox"/>
Full Names		Also Beneficiary	<input type="checkbox"/>
ID No		Cell phone	
Telephone Work	()	Telephone- House	()
E-mail		Occupation	
Res address			
Postal Address			
Institution			
Registration No			

2. TRUSTEES

ALK TO BE APPOINTED AS INDEPENDENT TRUSTEE

Surname		Also Beneficiary	<input type="checkbox"/>
Full Names			
ID No		Cell phone	
Telephone Work	()	Telephone- House	()
E-mail		Occupation	
Res address			
Postal Address			
Institution			
Registration No			
Previous experience as trustee			



Surname				Also Beneficiary <input type="checkbox"/>
<i>Full Names</i>				
<i>ID No</i>		<i>Cell phone</i>		
<i>Telephone Work</i>	()	<i>Telephone- House</i>	()	
<i>E-mail</i>		<i>Occupation</i>		
<i>Res address</i>				
<i>Postal Address</i>				
<i>Institution</i>				
<i>Registration No</i>				
<i>Previous experience as trustee</i>				

Surname				Also Beneficiary <input type="checkbox"/>
<i>Full Names</i>				
<i>ID No</i>		<i>Cell phone</i>		
<i>Telephone Work</i>	()	<i>Telephone- House</i>	()	
<i>E-mail</i>		<i>Occupation</i>		
<i>Res address</i>				
<i>Postal Address</i>				
<i>Institution</i>				
<i>Registration No</i>				
<i>Previous experience as trustee</i>				

3. AUDITOR

Surname			
<i>Full Names</i>			
<i>ID No</i>		<i>Cell phone</i>	
<i>E-mail</i>		<i>Telephone</i>	()
<i>Address</i>			
<i>Postal Address</i>			
<i>Institution</i>			
<i>Registration No</i>			
<i>Accredited by</i>		<i>Accreditation No</i>	

4. BENEFICIARIES

Surname			
<i>Full Names</i>			
<i>ID No</i>			
<i>Relationship to Founder</i>			
<i>Beneficiary type</i>	<i>Capital</i> <input type="checkbox"/>	<i>Income</i> <input type="checkbox"/>	



Surname	
<i>Full Names</i>	
<i>ID No</i>	
<i>Relationship to Founder</i>	
<i>Beneficiary type</i>	<i>Capital</i> <input type="checkbox"/> <i>Income</i> <input type="checkbox"/>

Surname	
<i>Full Names</i>	
<i>ID No</i>	
<i>Relationship to Founder</i>	
<i>Beneficiary type</i>	<i>Capital</i> <input type="checkbox"/> <i>Income</i> <input type="checkbox"/>

Surname	
<i>Full Names</i>	
<i>ID No</i>	
<i>Relationship to Founder</i>	
<i>Beneficiary type</i>	<i>Capital</i> <input type="checkbox"/> <i>Income</i> <input type="checkbox"/>

Surname	
<i>Full Names</i>	
<i>ID No</i>	
<i>Relationship to Founder</i>	
<i>Beneficiary type</i>	<i>Capital</i> <input type="checkbox"/> <i>Income</i> <input type="checkbox"/>

5. DURATION

<i>Specific durations of trust</i>	<i>YES</i> <input type="checkbox"/> <i>Until:</i>
	<i>NO</i> <input type="checkbox"/>
	<i>In Perpetuity</i> <input type="checkbox"/>