

Client Information - Trust

(Please provide a copy of the Trust Deed and any documents that vary/amend the Trust Deed e.g. Change of Trustees, Exclusion of Beneficiaries, etc)

Trust Details

Trust Name

Nature & Purpose of Trust

Bank Details (proof of bank account required)

Address Line One

IRD Number

Bank Name

Branch

Account Name

Account Number

Mailing Address (proof of address required)

Address Line One

Address Line Two

City

Postcode

Trustee Details (1)

Full Name (photo ID required)

First Name(s)

Middle Name(s)

Last Name(s)

Contact Details

Home

Work

Mobile

Email

Mailing Address (if different from first page)

Address Line One

Address Line Two

City

Postcode

Preferences

Preferred method of contact

- Email
- Post

Preferred Phone

- Mobile
- Business
- Home

Trustee Details (2)

Full Name (photo ID required)

First Name(s)

Middle Name(s)

Last Name(s)

Contact Details

Home

Work

Mobile

Email

Mailing Address (if different from first page)

Address Line One

Address Line Two

City

Postcode

Preferences

Preferred method of contact

Email

Post

Preferred Phone

Mobile

Business

Home

Check List

Have you attached:

- Photo Identification (Drivers License / Passport / Firearms License / Other)
- Proof of address (E.g. Electricity, gas, phone, or internet account)
- Proof of bank account (Bank statement showing account number and name)
- Copy of Trust Deed (and any changes of trustees/exclusion of beneficiaries etc.)

If you have a Trust, please also complete the form for **Client Information - Trust**

If you are an individual, please also complete the form for **Client Information - Individual**

Any Questions? Give us a call on 0800 872 0560

Gallie Miles to complete - Client Author:

Client No.:

