

Trust Details

This form is to be completed when a home loan application includes a Trust.

Information to include with this application:

- A copy of Trust Deed and any subsequent amendments for assessment
- Evidence of source of funds and source of wealth of the customer

Note: An original certified Trust document must be provided to the Customer's Solicitor prior to settlement.

Beneficial owners of the Trust will need to have their identity verified with original documentation prior to settlement.

TRUST DETAILS

Full Name of the Trust

Type of Trust (e.g. family, unit trust)

Address

Business name/s (if any) of the Trustees in respect of the Trust

Country where Trust established

Business activities (Please describe the nature of all business activities undertaken)

Does the client engage in business activities outside of New Zealand? Yes No

If yes, please list countries and activities

BENEFICIARY DETAILS

Please supply the name and date of birth of individuals who are the Trust's beneficiaries.

If the Trust has more than 10 beneficiaries or is a Discretionary or Charitable Trust, please supply a description of each class or type of beneficiary and if a Charitable Trust, the objects of the Trust.

Beneficiary 1		Beneficiary 2	
Beneficiary Name	<input type="text"/>		<input type="text"/>
Beneficiary DOB	<input type="text" value="Date"/>		<input type="text" value="Date"/>
Beneficiary 3		Beneficiary 4	
Beneficiary Name	<input type="text"/>		<input type="text"/>
Beneficiary DOB	<input type="text" value="Date"/>		<input type="text" value="Date"/>
Beneficiary 5		Beneficiary 6	
Beneficiary Name	<input type="text"/>		<input type="text"/>
Beneficiary DOB	<input type="text" value="Date"/>		<input type="text" value="Date"/>
Beneficiary 7		Beneficiary 8	
Beneficiary Name	<input type="text"/>		<input type="text"/>
Beneficiary DOB	<input type="text" value="Date"/>		<input type="text" value="Date"/>
Beneficiary 9		Beneficiary 10	
Beneficiary Name	<input type="text"/>		<input type="text"/>
Beneficiary DOB	<input type="text" value="Date"/>		<input type="text" value="Date"/>
Class/Type of Beneficiary (if applicable)	<input type="text"/>		
Objects of the Trust (if applicable)	<input type="text"/>		

SETTLOR/PROTECTOR/APPOINTOR DETAILS

Corporate Settlor(s) and/or Protector(s) and/or Appointor(s) 1

Name

Address

Corporate Settlor(s) and/or Protector(s) and/or Appointor(s) 2

Individual Settlor(s) and/or Protector(s) and/or Appointor(s) 1

Full Name

Residential
Address

Individual Settlor(s) and/or Protector(s) and/or Appointor(s) 2

DOB

Date

Date

Note: Settlor(s)/Protector(s) may need to have their identity verified with original documentation prior to final approval.