



BEZUIDENHOUTS

INGELYF • INCORPORATED
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QUESTIONNAIRE FOR REGISTRATION OF A TRUST

1. Full names of the trustees under the trust (One of the trustees must be an independent trustee):

2. Full names of the Founder of the trust:

3. Confirmation that at least one of the trustees is an independent trustee:

4. The names and ages of the beneficiaries under the trust:

5. **The relationship of the trustee to the beneficiaries and if the trustee and the beneficiaries are related, or the trustee is also a beneficiary, a written motivation why such a trustee should be appointed.**

6. **The probable duration of the trust:**

7. **The written views of the beneficiaries under the Trust as to the Master of the High Court exempting the trustee from furnishing security under the Trust Property Control Act, No 57 of 1988.**

8. **The profession and/or business occupation of the trustee:**

9. **What previous practical experience the trustee has in trust administration, referring to specific matters.**

9.1 Whether the trust will be subject to annual audit and if so, the following to be furnished:

The name and address of the auditor:

9.2 A written undertaking by the auditor to advise the Master of the Court without delay and in writing:

9.2.1 *Should he/she cease to act as auditor in the trust;*

9.2.2 *The name and address of the new auditor, should he/she be aware thereof;*

9.2.3 *Of any substantial addition to the capital and/or the value of the trust*

9.2.4 *Should any irregularity in connection with the administration of the trust come to his/her notice and such irregularity is not within one month from the date on which it was reported by him/her to the trustees of the trust, rectified to the satisfaction of the auditor;*

10. What steps will be taken by the trustee to maintain accurate records of the trust, whether he/she will exercise direct personal control over the trust and if not, the name and address of the agent who has been instructed by him/her to maintain accurate records and the extent of such mandate.

11. The name of the Bank and the branch at which the trust banking account will be opened.

12. Confirmation that the bulk of the trust assets will be situated in the jurisdiction of the Master of the High Court to whom application for the registration of the trust is made.

13. Name of the Trust:

14. **Residential & Postal addresses of each trustee and founder under the trust:**

15. **Copy of trustees and beneficiaries ID documents.**