

Checklist

for setting up a Trust

These are some **personal items and documents** you might need to bring with you to an appointment with a legal professional when **setting up a Trust**.

- ☐ Personal information*
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- ☐ Identification documents (passport or driving license)
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- ☐ Proof of address
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- ☐ Details of the proposed Trustees
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- ☐ Details of the Beneficiaries
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- ☐ Current care and support arrangements
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- ☐ Details of assets you plan to place in the Trust
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- ☐ Medical or disability evidence (if necessary)
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- ☐ Purpose and intentions of the Trust
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- ☐ Tax registration documents
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- ☐ Letter of Wishes
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- ☐ Any questions and concerns you have
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* full name, date of birth, address, contact details, details of disability, marital status and details of family members
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