Northstar Asset Management (Pty) Ltd - Client Profile Form for a **Trust.**

Please would you return to us all duly completed and signed Client Profile Forms together with original or **certified copies** of the required original documents.
Please complete all relevant sections in full using block letters. Any amendments made to the form must be initialed by the client.

Registered name

Registration number

Trust Income tax number

Source of Funds *(indicate "X"):*

☐ Inheritance ☐ Savings ☐ Salary ☐ Bonus ☐ Company Profits

Other -*please specify:*

Postal Address

code

Trust's Bank account details

Bank: Branch code:

Account number: Account type:

Contact person - Surname Title

First names

Contact Address

code

SA Identity Number or Passport Number *(if contact person is a foreigner):*

Date of Birth D D M M Y Y Y Y Nationality

Tel (h): code Fax (h): code

Tel (w): code Fax (w): code

Tel (c):

email address:

I hereby confirm that the above information and attached documents are true and accurate.

Signature Date

Name

Please ensure that the following documents are returned with this Client Profile (originals or certified copies):		
		NB: Originals or certified copies of the required original documents.
		NB: Documents to be less than 3 months old.
		1 - Certified copies of ID of: a) Founder, b) each trustee, c) each beneficiary and d) authorised signatories
		2 - Recent document containing name and address - utility bill (eg: rates, Telkom), bank statement or SARS document, of each of the following:
		a) Founder, b) each trustee, c) each beneficiary and d) authorised signatories
		3 - and, if not mentioned by name, details of how beneficiaries are determined.
		4 - Main Trust deed or other founding document (eg: a will)
		5 - Letter of Authority from Master of High Court (SA Trust), or foreign regulator (foreign trusts) to trustees
		6 - A death certificate or certificate of deregistration where founder has died
		7 - Recent document containing *Trust's* name and address - utility bill (eg: rates, Telkom), bank statement or SARS document
		8 - Proof of banking details (cancelled cheque or Bank statement)
		9 - SARS document letter with Trust's name and tax number