



SERVO FIDUCIARY SERVICES

Conserve & Preserve

APPLICATION FORM FOR A TRUST
AANSOEKVORM VIR 'N TRUST

Please complete in full and return to / Vul asseblief volledig in en stuur aan: info@servofs.co.za

FORM COMPLETED BY/ VORM VOLTOOI DEUR

Surname/ Van
Full names/ Volle name
Tel
Email/ E-pos

TRUST DEED / TRUSTAKTE

English Afrikaans

Name of Trust/Naam van Trust

FOUNDER/ OPRIGTER

(Person creating trust/ Persoon wat trust stig)

Surname/ Van
Full names/ Volle name
Id number/ Id nommer

TRUSTEES

(One of the trustee should be independent: not related to any of the beneficiaries/founder or other trustees. Preferably a professional trustee)
(Een van die trustees behoort onafhanklik te wees: nie verwant aan die begunstigdes/oprigter en ander trustees. Verkieslik 'n professionele trustee)

Trustee (1)

Surname/ Van
Full names/ Volle name
Id number/ Id nommer
Occupation/ Beroep
Postal address/ Posadres
Physical address/ Straatadres

Trustee (2)

Surname/ Van _____
Full names/ Volle name _____
Id number/ Id nommer _____
Occupation/ Beroep _____
Physical address/ Straatadres _____

**Independent/Professional Trustee (3)
Onafhanklike/Professionele Trustee (3)**Servo Fiduciary Services (Pty) Ltd

Surname/ Van _____
Full names/ Volle name _____
Id number/ Id nommer _____
Occupation/ Beroep _____
Physical address/ Straatadres _____

BENEFICIARIES/ BEGUNSTIGDES**Beneficiary/ Begunstigde (1)**

Surname/ Van _____
Full names/ Volle name _____
ID number / Date of birth _____
Relationship to founder/ Verwantskap tot oprigter _____
Income/Inkomste Capital/ Kapitaal

Beneficiary/ Begunstigde (2)

Surname/ Van _____
Full names/ Volle name _____
ID number / Date of birth _____
Relationship to founder/ Verwantskap tot oprigter _____
Income/Inkomste Capital/ Kapitaal

Beneficiary/ Begunstigde (3)

Surname/ Van _____
Full names/ Volle name _____
ID number / Date of birth _____
Relationship to founder/ Verwantskap tot oprigter _____
Income/Inkomste Capital/ Kapitaal

Beneficiary/ Begunstigde (4)

Surname/ Van _____
Full names/ Volle name _____
ID number / Date of birth _____
Relationship to founder/ Verwantskap tot oprigter _____
Income/Inkomste Capital/ Kapitaal

Beneficiary/ Begunstigde (5)

Surname/ Van _____
Full names/ Volle name _____
ID number / Date of birth _____
Relationship to founder/ Verwantskap tot oprigter _____
Income/Inkomste Capital/ Kapitaal

Ultimate Beneficiary or Class of Beneficiaries/ Uiteindelike Begunstigde of Klas van Begunstides – Family Obliteration/ Gesinsuitwissing

Surname/ Van _____
Full names/ Volle name _____
Relationship to founder/ Verwantskap tot oprigter _____
Class of beneficiaries or charitable organisation: _____

Additional Trustees / Beneficiaries / Notes

