



REPUBLIC OF SOUTH AFRICA

ACCEPTANCE OF TRUSTEESHIP BY TRUSTEE (Inter-Vivos Trust)

I (Full names and surname) .....

ID / Passport No: [grid]

Representative of Organisation (If Applicable) .....

Registration Number (If Applicable) .....

Hereby apply for authority in terms of Section 6(1) of the Trust Property Control Act, 1988 (Act 57 of 1988) to act as trustee of the Trust known as:

I choose the following address for the purposes of Section 5 of the Trust Property Control Act, 1988 (Act 57 of 1988):

Domicillium Citandi et executandi (physical address)

Postal Address

[Dotted lines for address entry]

Tel: .....

Cell: .....

E-mail: .....

- 1. Is this a family business trust? Yes [ ] No [ ]
2. I am an Independent Trustee? (If, yes complete attached sworn Affidavit) Yes [ ] No [ ]
3. Is trustee also the beneficiary? Yes [ ] No [ ]
4. Is trustee related to any beneficiary or trustee? Yes [ ] No [ ]
5. Are all the beneficiaries related to one another? Yes [ ] No [ ]

Profession and or business occupation of the trustee: .....

Previous practical experience in trust administration: Mention any specific cases.

[Dotted lines for experience entry]

Will exercise direct special personal control to maintain accurate trust records? Yes [ ] No [ ]

\* Each Trustee must submit a separate Acceptance of Trusteeship by Trustee form
\*\* Please attach an original certified copy of your ID Document not older than three months.

**DECLARATION BY TRUSTEE**

I am qualified to act as trustee and do not find myself in any of the circumstances mentioned in Section 20(2) of the Trust Property Control Act, 1988 (Act 57 of 1988), which will justify my removal and undertake to inform the Master immediately should any such circumstances arise.

Thus I declare the following:

- Trustee ever been convicted of any offence of dishonesty or sentenced to prison without a fine option?      Yes       No
- Trustee ever been declared insolvent?      Yes       No
- Trustee ever been removed from office in respect to any appointment as a Trustee?      Yes       No
- Trustee ever been declared mentally ill / incapacitated?      Yes       No

**Provide reason if any of the above was answered YES:**

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- Trustee has knowledge and understands the law of trust?      Yes       No
- Trustee is aware of the fiduciary duties and responsibilities?      Yes       No
- By accepting the position of trustee, you are exposing yourself to civil and criminal actions in terms of section 9 of the Trust Property Control Act, 1988 (Act 57 of 1988)      Yes       No
- By accepting the position of trustee, you are exposing yourself to removal action by the Master for failure to comply with any lawful request of the Master including a request to account in terms of section 16 of the Trust Property Control Act, 1998 (Act 57 Act of 1998)      Yes       No
- Trustee will exercise direct special personal control to maintain accurate trust records      Yes       No

**Provide reason if any of the above was answered NO:**

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**UNDERTAKING**

I undertake to inform the Master should there be any changes in the capital/income beneficiaries in this Trust

I undertake to instruct the Auditor to furnish The Master, when requested to do so, with any information which the Master may require in connection with the affairs of the Trust.

Signed at ..... on the ..... day ..... Month ..... Year .....

.....

**Signature of Trustee**

I certify that on the ..... day ..... Month ..... Year at ..... and in my presence the deponent signed the Acceptance Of Trusteeship by Trustee and declared that she knows and understand the contents hereof, has no objection to taking this oath and considers the oath to be binding on her conscience, and I further certify that the requirements of Regulation GN R1258 of 21 July 1972, amended by GN R1648 of 19 August 1977, and as further amended by GN R1428 of 11 July 1980, and as further amended by GN R774 of 23 April 1982 in terms of Section 10 of the Justices of the Peace and Commissioners of Oaths Act, Act 16 of 1963 have been complied with in all respects.

.....  
**Commissioner of Oath**

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