

Supplement 23 – Pilot Trust

Client Surname	First Names
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- Please affix this supplementary form to the instruction and tick the appropriate box on front page
- A minimum of two trustees are required
- Attach Client Identity forms for Settlor(s) and Trustees

No. of Trusts
 Trusts

No. of

Pilot Trust(s) - One Settlor	
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Pilot Trust(s) - Two Settlers	
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State the purpose of the Pilot Trust(s):	<input checked="" type="checkbox"/>
Lifetime disposition of Personal Assets (under the 7 year rule)	
Testamentary disposition of Personal Assets / Pension / Death in Service / Life Insurance	
Testamentary disposition of Assets attracting 100% Business Property Relief	

Name of the Trust - i.e. The David Brown Family Settlement
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Appointment of Trustees

Are the Trustees to be the same individuals as the Executors of the Will? Please list below the alternative/additional Trustees	YES / NO
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Trustee	
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Address	
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Postcode	Phone	
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Relationship to S1	Relationship to S2
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Trustee	
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Address	
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Postcode	Phone	
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Relationship to S1	Relationship to S2
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Trustee	
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Address	
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Postcode	Phone	
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Relationship to S1	Relationship to S2
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Other Notes: