

**Children's Protective Trust (CPT)**



<b>Surname(s)</b>		<b>First Name(s)</b>	
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**CPT Information:**

- Please affix this supplementary form to the instruction and tick the appropriate box on front page.
- The CPT is designed to run for up to 125 years and is discretionary. The Testators can gift some or all of their Residuary Estate, or a particular cash sum / asset to the Trust and the Trustees may make distributions of income and / or capital or loans to anyone within the beneficiary class.
- The Trust requires at least two Trustees, if necessary, nominate additional Trustees.
- It is important that your intentions behind the CPT are explained within a Letter of Wishes; Goodwills Legal Services Limited will prepare a Letter of Wishes based on the instructions provided.
- The CPT allows your Trustees to make financial judgements for your children that you would have made. The Trust gives your Trustees total control of income and capital payments to your children until they are old enough to personally inherit.
- Placing assets in the CPT can protect them from potential creditors or spendthrift beneficiaries.

**Is the CPT to be established on First or Second Death:**

	Please Tick ✓
<b>Trust to be Established on <u>First</u> Death?</b>	
<b>Trust to be Established on <u>Second</u> Death?</b>	
<b>N/A (tick if Testator is creating a single Will)</b>	

**If you are placing your Residuary Estate into a CPT, please complete the below:**

	Please Tick ✓		
<b>'I wish to place 100% of my Residuary Estate into a CPT'</b>		<b>Percentage</b>	<b>100%</b>
<b>'I wish to place a specified percentage of my Residuary Estate into a CPT'</b>		<b>Percentage</b>	<b>___%</b>

**If you are placing a particular cash sum / asset into a CPT, please complete the below:**

Asset	Address / Account Details / Policy Number and Provider	Value £
		£
		£
		£

<b>Are the CPT Beneficiaries the Same as the Residuary Estate? (please circle)</b>	<b>Yes</b>	<b>No</b>
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If the CPT Beneficiaries are Different, Please Enter Beneficiaries' Details Below:

Full Name(s)	Relationship to Testator	Share %
		___%
		___%
		___%
		___%
		___%

Are the 2 <sup>nd</sup> Testator's Beneficiaries the Same as the 1 <sup>st</sup> Testator's? (please circle)	Yes	No
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If the 2<sup>nd</sup> Testator's Beneficiaries are Different, Please Enter Beneficiaries' Details Below:

Full Name(s)	Relationship to Testator	Share %
		___%
		___%
		___%
		___%
		___%

At what age would you like your children to inherit outright? (please specify, must be between ages 18-25)	_____
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Trustees Same as Executors? (please circle)	Yes	No (complete below)
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Trustees:

Full Name		Telephone	
Relationship to T1		Relationship to T2	
Full Address			

Full Name		Telephone	
Relationship to T1		Relationship to T2	
Full Address			

Full Name		Telephone	
Relationship to T1		Relationship to T2	
Full Address			

<b>Full Name</b>		<b>Telephone</b>	
<b>Relationship to T1</b>		<b>Relationship to T2</b>	
<b>Full Address</b>			

<b>Notes (please record any specific purposes / intentions behind the establishment of the CPT)</b>