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## INTER VIVOS TRUST APPLICATION FORM

CLIENT NAME: \_\_\_\_\_

TEL & FAX: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

1. NAME OF TRUST: .....

2. DONOR/ FOUNDER:  
FULL NAMES AND SURNAME .....

IDENTITY NUMBER .....

MARITAL STATUS: .....

PHYSICAL ADDRESS .....

3. TRUSTEE 1: (Founder)  
FULL NAMES AND SURNAME .....

IDENTITY NUMBER .....

PHYSICAL ADDRESS .....

BENEFICIARY Yes / No

OCCUPATION .....

4. TRUSTEE 2:  
FULL NAMES AND SURNAME .....

IDENTITY NUMBER .....

PHYSICAL ADDRESS .....

BENEFICIARY Yes / No

OCCUPATION .....

Long Island Trading 259 cc Reg no: CK 2004/054384/23, Trading as InCommercial Property Services

Members: Cobus (JJ) van der Merwe 083 4405172, [savoy6@mweb.co.za](mailto:savoy6@mweb.co.za)

Johan (JJ) Jordaan 082 3015724, [jjsj@telkomsa.net](mailto:jjsj@telkomsa.net)

5. TRUSTEE 3: (Non Related)  
 FULL NAMES AND SURNAME .....

IDENTITY NUMBER .....

PHYSICAL ADDRESS .....

BENEFICIARY **NO**

OCCUPATION .....

6. BENEFICIARIES

<u>FULL NAMES:</u>	<u>ID NO / BIRTH DATES:</u>
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.....	.....
.....	.....

7. ACCOUNTING OFFICER:

NAME & SURNAME .....

NAME OF PRACTICE .....

PHYSICAL ADDRESS  
 OF PRACTICE .....

9. SPECIAL REQUESTS / WISHES:

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.....  
 SIGNATURE OF CLIENT

.....  
 DATE

Notes:

- ✓ The donor / founder will normally act as a trustee.
- ✓ At least one trustee should not be related to the founder or the other trustees. Such trustee should not be a beneficiary.
- ✓ A new will need to be drafted as, in most cases; the trust will be the heir of the estate.
- ✓ A bank account needs to be opened in the name of the trust.
- ✓ The trust first need to be registered at the Master of the Supreme Court before:
  - the will could become effective,
  - the bank account could be opened.
- ✓ Proper planning of the transfer of assets into the trust should be done in liaison with the accounting officer to avoid costs and taxes.