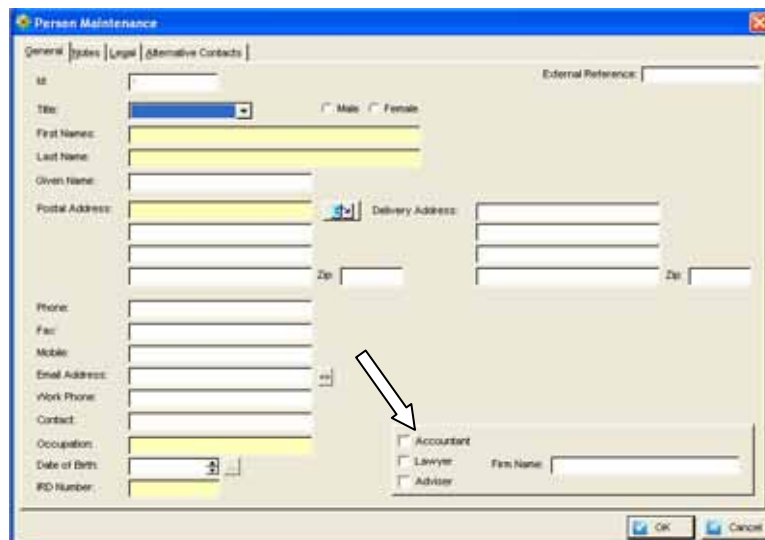


SHOULD I ADD A PERSON OR A COMPANY?

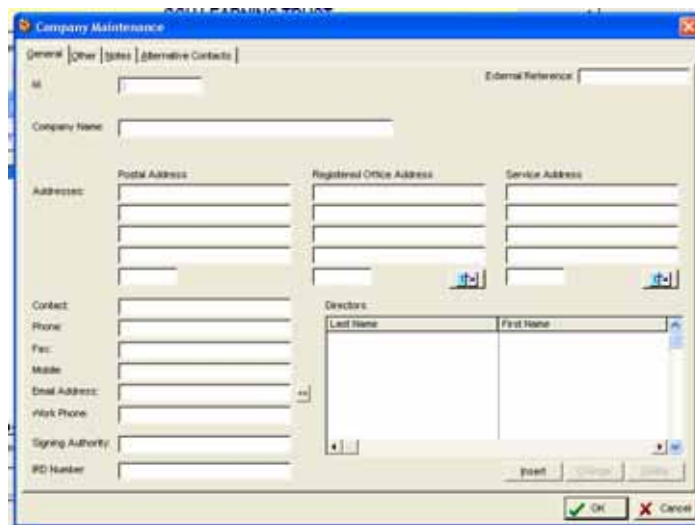
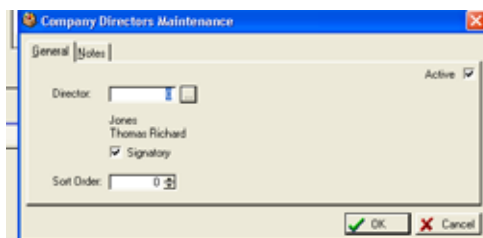
When to add a person

- ⇒ If the individual is the Trustee, rather than being the Director of a Trustee Company
- ⇒ If your Trust Client (Settlor's) has a personal connection to an accountant and will remain with that accountant regardless of which company they are working for - remember to tick the box & add the Firm Name
- ⇒ If your Trust Client (Settlor's) has a personal connection to a solicitor and will remain with that solicitor regardless of which company they are working for - remember to tick the box & add the Firm Name
- ⇒ You may chose to add your own employees (solicitors, lawyers, accountants) as People to link them to the Trust, as well as being the Manager of the Trust



When to add a Company

- ⇒ If you are using a Trustee company rather than the individual being a Trustee.
- ⇒ If your Trust Client (Settlor) is a client of a particular accountancy company and will remain with that company regardless of which accountant they are assigned
- ⇒ If your Trust Client (Settlor) is a client of a particular a law firm and will remain with that firm regardless of which solicitor/lawyer they are assigned
- ⇒ You may chose to add your own company and/or any Trustee companies you have

You must assign at least 1 Director to a company if you want the company to appear as a signatory on Precedents

SIGNED AS A DEED

CCH Trustee Ltd as a Trustee
by:

D Director (Director)

in the presence of

witness

occupation

address