

## Form B: Trust Information Form

*The following information is requested to enable us to better understand your personal circumstances with a view to the establishment of a trust. Further information may be required, based on your answers to the questions set forth below. All information provided will be held in confidence.*

### Personal information:

Full name (including middle name(s) and any assumed name(s)):	
Current permanent address:	
Home telephone: Fax: Mobile:	
Home e-mail address:	
Date of birth:	
Place of birth:	
Nationality:	
Any other citizenship(s):	

Social security number:	
Marital status:	
Occupation and nature of business:	
Business address:	
Business telephone: Fax: Mobile:	
Business e-mail address:	
Passport number, date and place of issue:	
Bank which will provide reference:	
How did you find St. George's Trust?	

**Family information**

Full name of spouse(including middle name(s) and any assumed name(s)):	
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Current permanent address and telephone/fax numbers (if different from above):	
Date of birth:	
Place of birth:	
Nationality:	
Any other citizenship(s):	
Occupation and nature of business:	
Business address:	
Business telephone Fax: Mobile:	
Passport number, date and place of issue:	
Bank which will provide reference:	
Name, date of birth, nationality and current permanent address (if different from above) of	



<p>about which we should be aware (i.e. drug addictions, divorce, bankruptcy, special needs children, etc.):</p>	
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**Current advisors**

<p>Name, firm, address and contact numbers of your <b>accountant</b>:</p>	
<p>Name, firm, address and contact numbers of your <b>lawyer</b>:</p>	
<p>Name, firm, address and contact numbers of your <b>investment advisor/broker</b>:</p>	
<p>Name, firm, address and contact numbers of any <b>other personal advisors</b>:</p>	
<p>Name, address and contact numbers of your <b>executors</b>:</p>	

**Asset information**

Estimated net worth (in base currency):	
Percentage breakdown of asset by class (i.e. cash, real estate, securities, insurance policies, fine art, etc.):	
Location of assets:	
Details of any existing estate planning structures (i.e. will, domestic or foreign trust, company etc.) and jurisdiction of same:	

<p>Details of assets to be settled in trust, origin and value of same:</p>	
<p>Companies to be incorporated or acquired (if any) by the trust, including jurisdiction, name, directors, business purpose:</p>	
<p>Objectives/aims/goals in establishing an offshore structure:</p>	
<p>Investment guidelines/base currency:</p>	

***In addition to the above information and in accordance with our Policy on the Acceptance of New Business, every prospective client will be required to provide:***

- A *notarised* copy of the identification pages of his or her passport, incorporating a photograph and a *notarised copy* of a valid driver's licence incorporating a photograph, where the prospective client is not in possession of a passport;
- A reference from the bank with which the client is currently most closely connected. The bank must be widely known and the reference must speak to both the character and financial stability of the client and confirm the number of years (minimum of two) for which the client has been known to the bank;
- A *notarised* copy of your utility (or equivalent) bill confirming home address details;
- An introduction from a member of the local community or a reputable international legal or accounting practice.