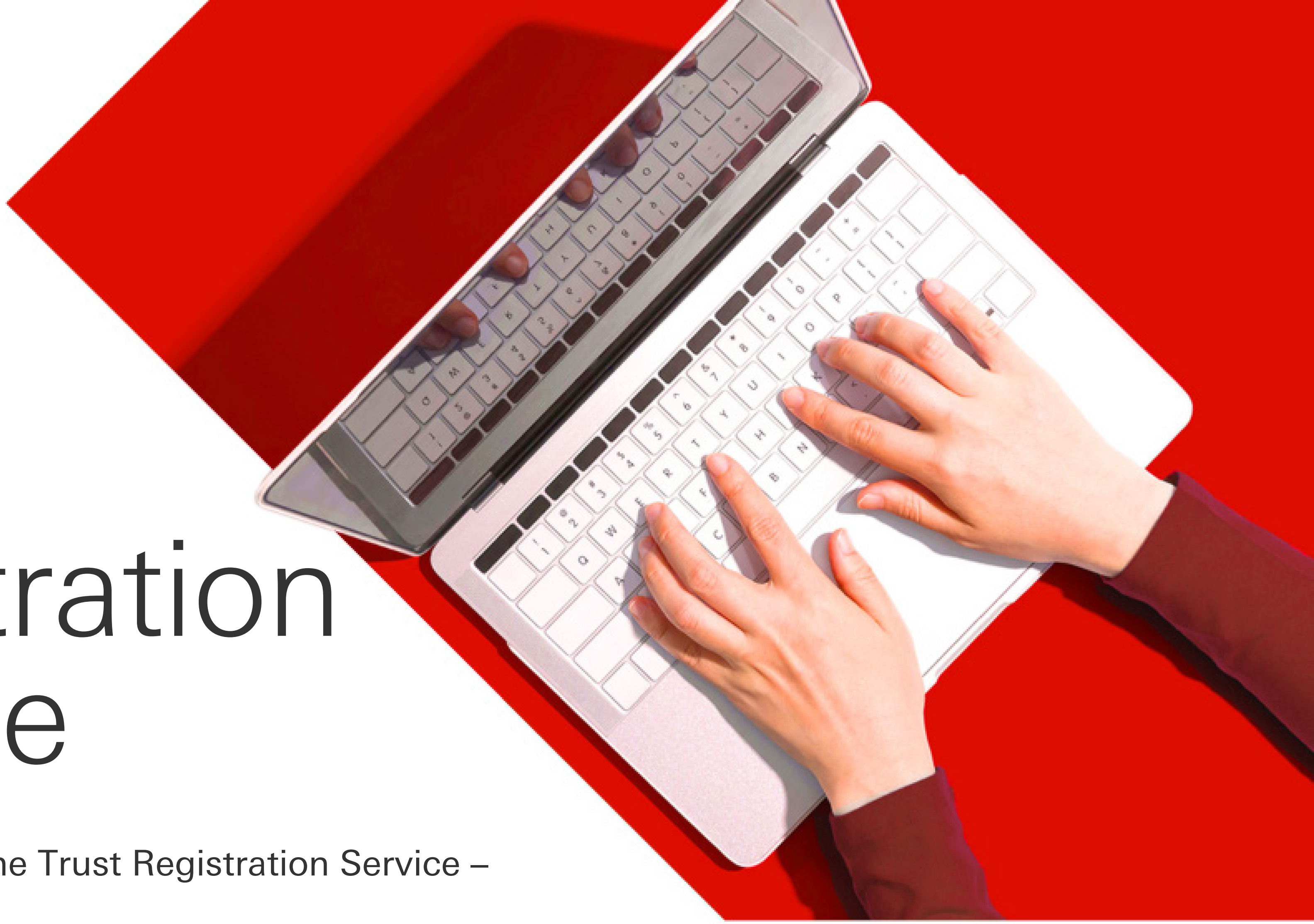

Trust Registration Service

A practical guide to the Trust Registration Service –

Stage 3 - How to obtain evidence of a Trusts registration.

HSBC Life

The Trust Registration Service

A Practical Guide to completing TRS registration

In the previous section, the trustee(s) will have or should have completed a declaration at the end of the registration process which means that the trust information has been submitted to HMRC via the TRS website.

In this section - we will show the trustee(s) what the steps are to enable them to obtain evidence of their trust's registration.

It is worth noting that if you have a trust that was in existence before the 1st of September 2022 then your adviser and the associated product provider are not required to gather evidence of its registration.

Important: However, there are now a series of events that the trustees will be required to provided evidence of the Trusts registration. These included but are not limited to,

- New business or change of investment vehicle
- Full or partial surrenders;
- Top-up applications, including further loans to Loan Trusts;
- Death claims;
- Arrangement of new withdrawals, including an existing withdrawal being increased; and
- Changing bank accounts for existing withdrawals.

The effect of not supplying the supporting evidence is that it will cause a delay to the requested transaction e.g. the release of funds which could potentially disadvantage the parties concerned

From the 1st of April 2023, There is also an addition requirement to provide up to date evidence of registration for administrative aspects of running the trust, we will cover those in our 4th Guide - **How to Maintain your Trust.**

Stage 3 - Maintaining your trust including how to obtain your TRS certificate

https://www.gov.uk/guidance/manage-your-trusts-registration-service

English | Cymraeg

Guidance

Manage your trust's details

Use the online service to update details of your trust, declare no changes, authorise an agent, get proof of registration or close a trust on the trust register.

From: HM Revenue & Customs

Published 3 April 2020

Last updated 17 October 2022 — See all updates

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Contents

Related content

Register a trust as an agent

Register your client's estate

Register a trust as a trustee

Managing your client's Capital Gains Tax on UK property account

Register a trust or estate: service availability and issues

To access the ***Maintain Your Trust*** section, please use the link that is on the top of the page opposite to enable you to access the correct area of the TRS website.

You can either CTRL+ click on the link or copy and paste it into you search engine bar.

This will then open the **Manage your trust's details** page (see opposite).

This page provides details of what needs to be supplied for any alterations that are made to the trust .

To move to the ***Maintain Your Trust Section please*** scroll to the bottom of the page and click **Start Now** ..

Please see following page.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate

https://www.gov.uk/guidance/manage-your-trusts-registration-service

Using the online service

Before you can view, update the details, or authorise an agent, you'll need the 'Organisation' Government Gateway user ID and password you used when you registered the trust. If you do not have one, you can create one the first time to go into the service.

Start now ❯

Service availability

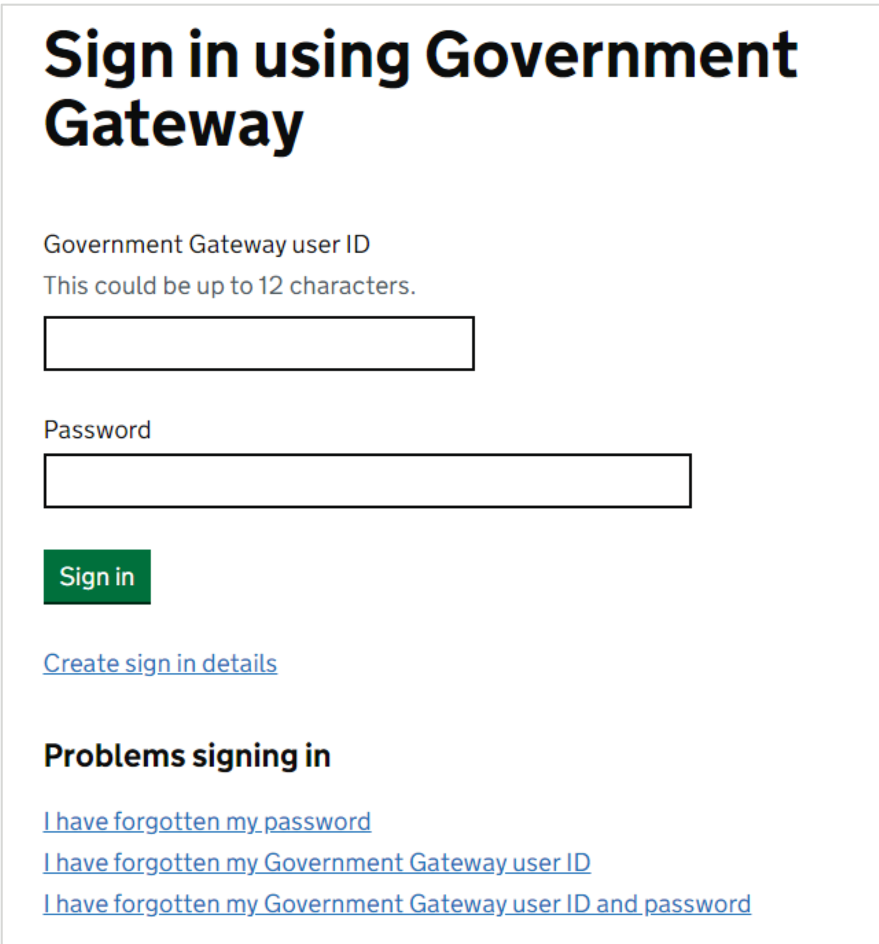
HMRC services may be slow during busy times. Check if there are any problems with this service.

This slide provides detail at the bottom of the page of the **Manage your trust's details**.

To access the ***Maintain Your Trust*** Area please ensure you scroll to the bottom of the page and click **Start Now.**

This will open the Government Gateway ID page.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate



Sign in using Government Gateway

Government Gateway user ID

This could be up to 12 characters.

Password

Sign in

Create sign in details

Problems signing in

I have forgotten my password

I have forgotten my Government Gateway user ID

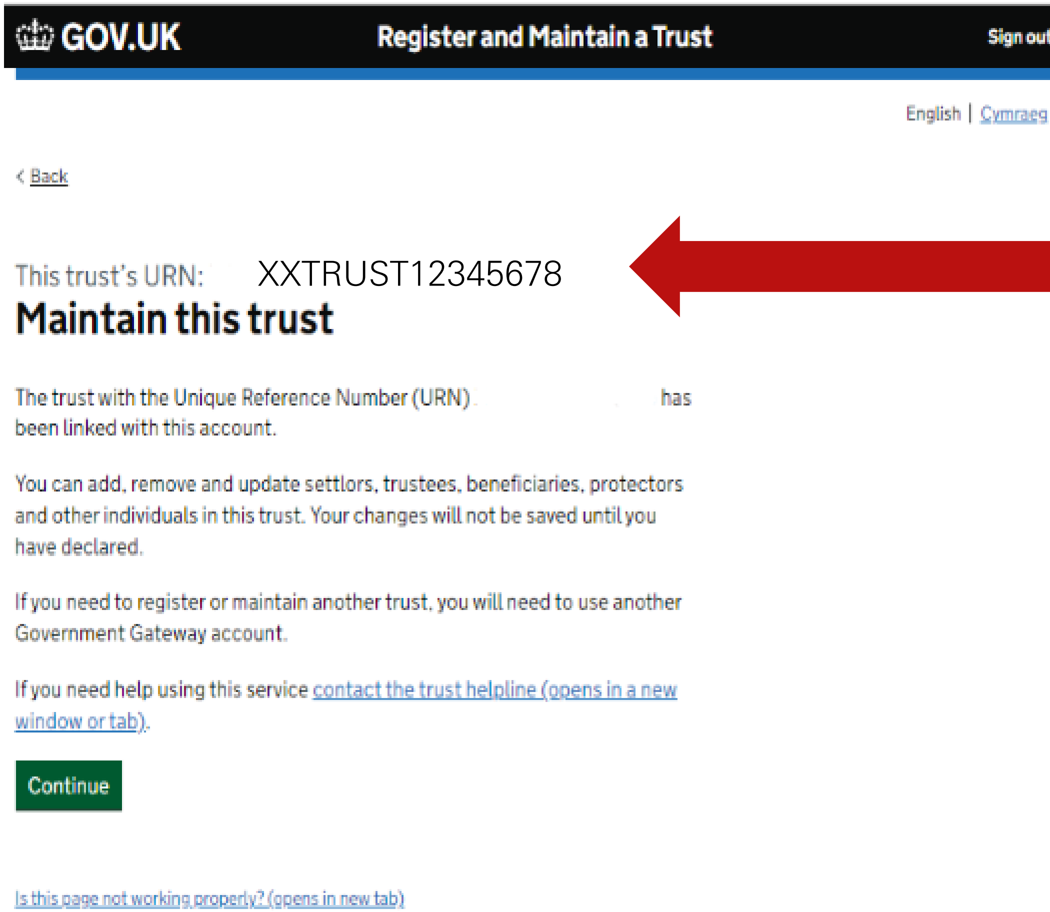
I have forgotten my Government Gateway user ID and password

Please insert the trust's unique Organisation Gateway ID along with the password that was used to register the trusts access to the TRS site.

Once logged on there will be a series of questions that require your attention which are covered in the next two slides.

After that there are security questions which are randomly selected and are about the trust itself - i.e., name of lead trustee or name and date of birth of settlor etc.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate



GOV.UK Register and Maintain a Trust Sign out

English | Cymraeg

< Back

This trust's URN: XXTRUST12345678

Maintain this trust

The trust with the Unique Reference Number (URN) has been linked with this account.

You can add, remove and update settlors, trustees, beneficiaries, protectors and other individuals in this trust. Your changes will not be saved until you have declared.

If you need to register or maintain another trust, you will need to use another Government Gateway account.

If you need help using this service contact the trust helpline (opens in a new window or tab).

Continue

Is this page not working properly? (opens in new tab)

Once you have successfully logged in you will be provided with the Unique Tax reference number (URN) for the trust.

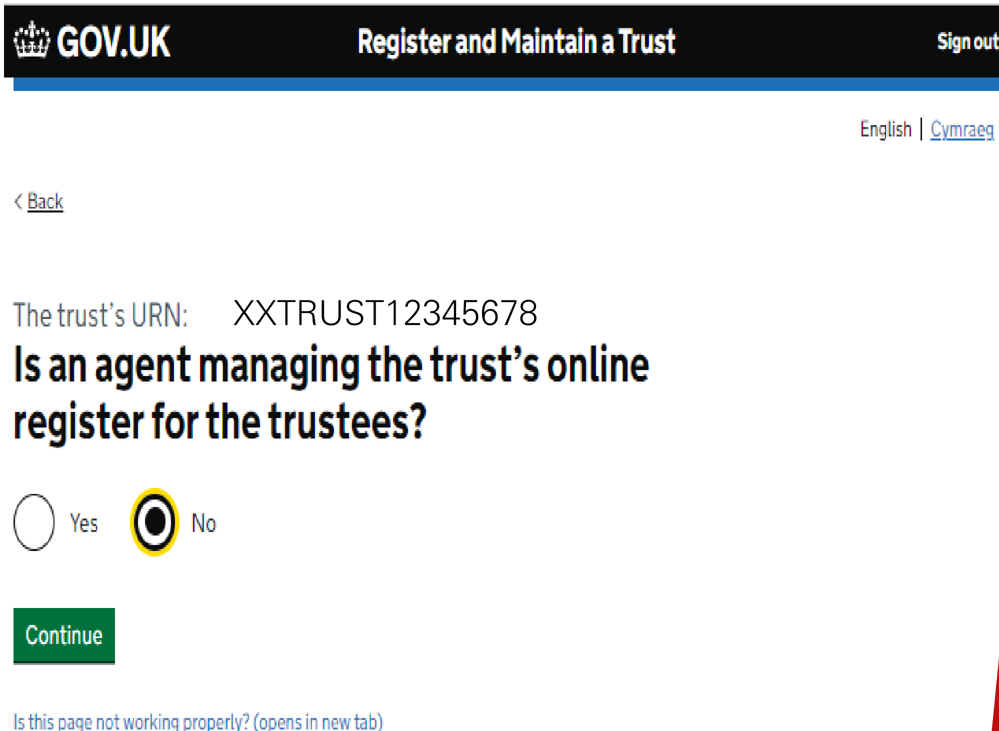
It is worth noting that down and sharing it with at least one of the other trustees or your adviser.

You will be also informed of the other functionalities that can or may need to be done at any point during the trust's lifetime.

Select Continue to progress.

You will now be asked a series of questions about who is making the changes to the trust.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.



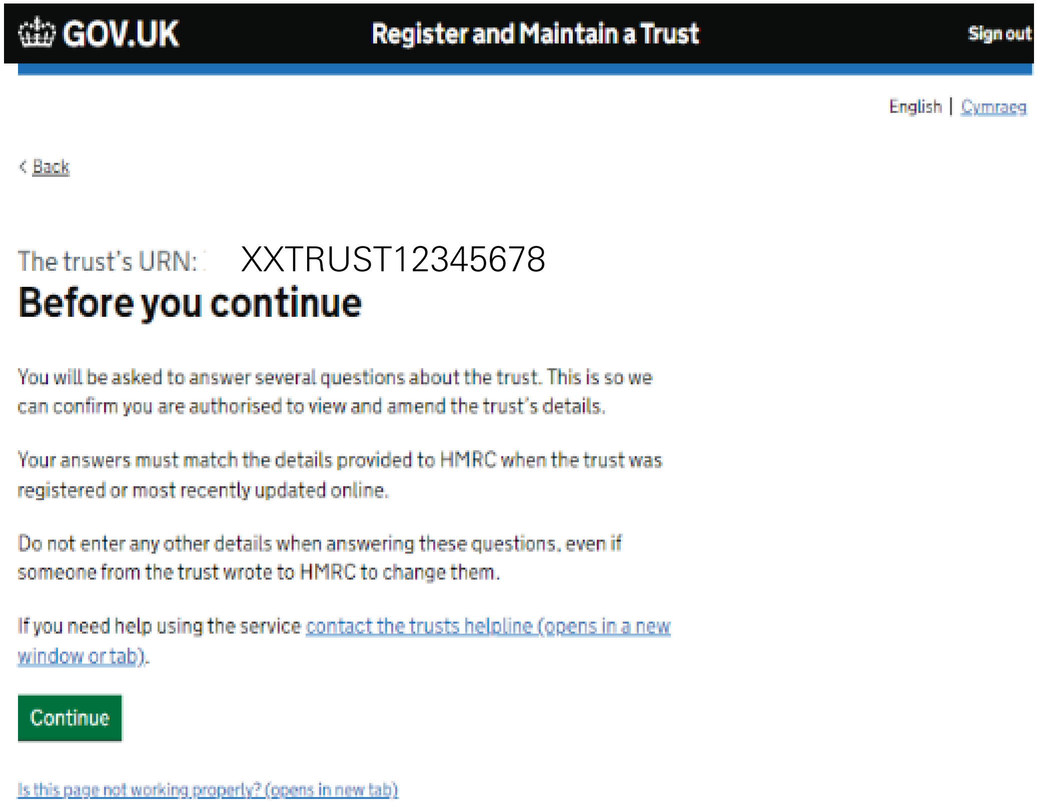
The first question is about who is managing the trust .

If the lead trustee or a trustee are managing the trust, then **select no** and continue.

If you are working with or have appointed an agent – that is someone who has created the Gateway ID and completed the registration on your behalf, then the answer will be Yes.

If an agent is being added, you will then be asked to provide details of the agent, which will enable their involvement in your trust

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.


GOV.UK Register and Maintain a Trust Sign out

English | Cymraeg

Back

The trust's URN: XXTRUST12345678

Before you continue

You will be asked to answer several questions about the trust. This is so we can confirm you are authorised to view and amend the trust's details.

Your answers must match the details provided to HMRC when the trust was registered or most recently updated online.

Do not enter any other details when answering these questions, even if someone from the trust wrote to HMRC to change them.

If you need help using the service contact the trusts helpline (opens in a new window or tab).

Continue

Is this page not working properly? (opens in new tab)

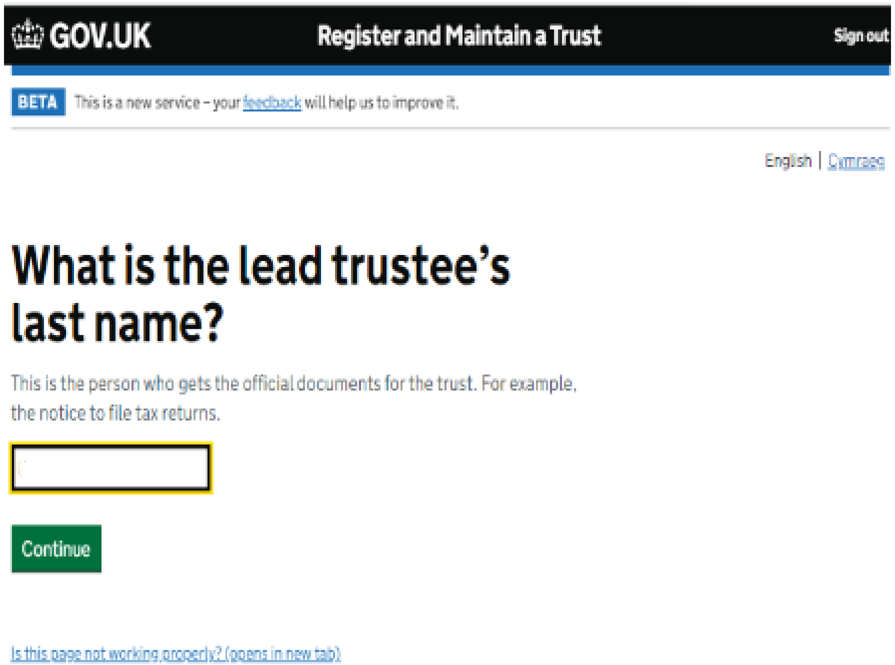
The next slide informs you that there will now be a series of security questions that will need be to answered correctly .

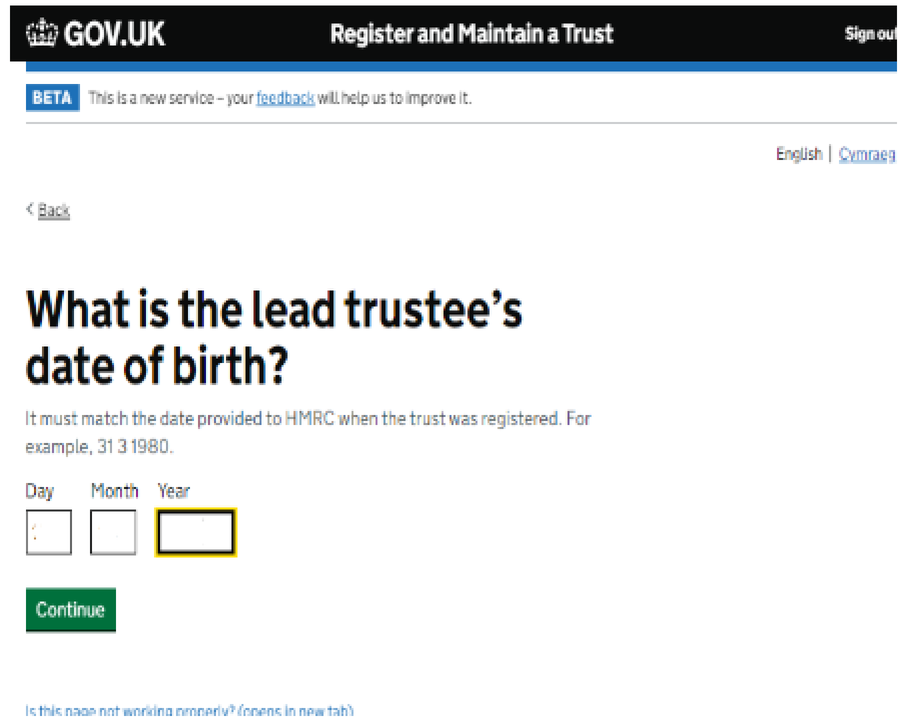
As stated previously, these questions relate to your trust and must match what was submitted when the trust was registered.

The following pages provide examples of the type of questions that will be asked.

Please **select Continue** to start the process.

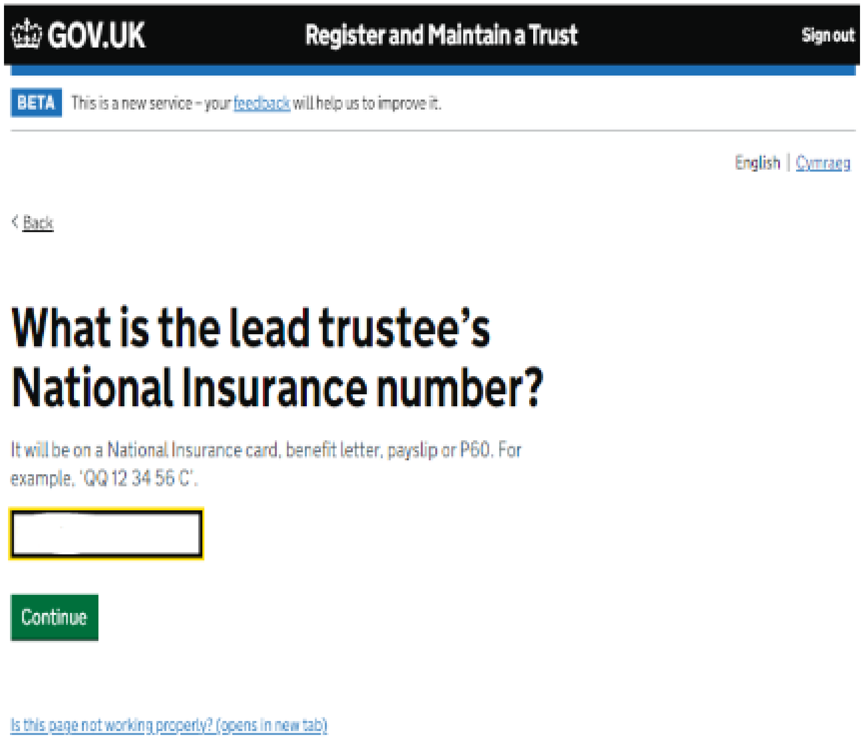
Stage 3 - Maintaining your trust including how to obtain your TRS certificate.

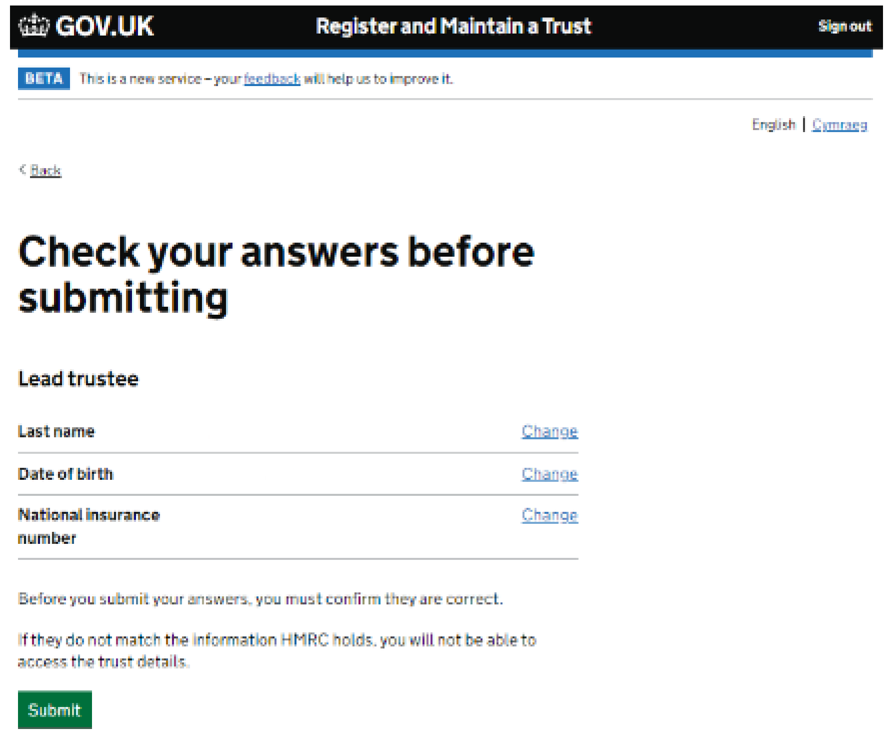




There are generally three questions, once each one has been answered you need to click **Continue**.

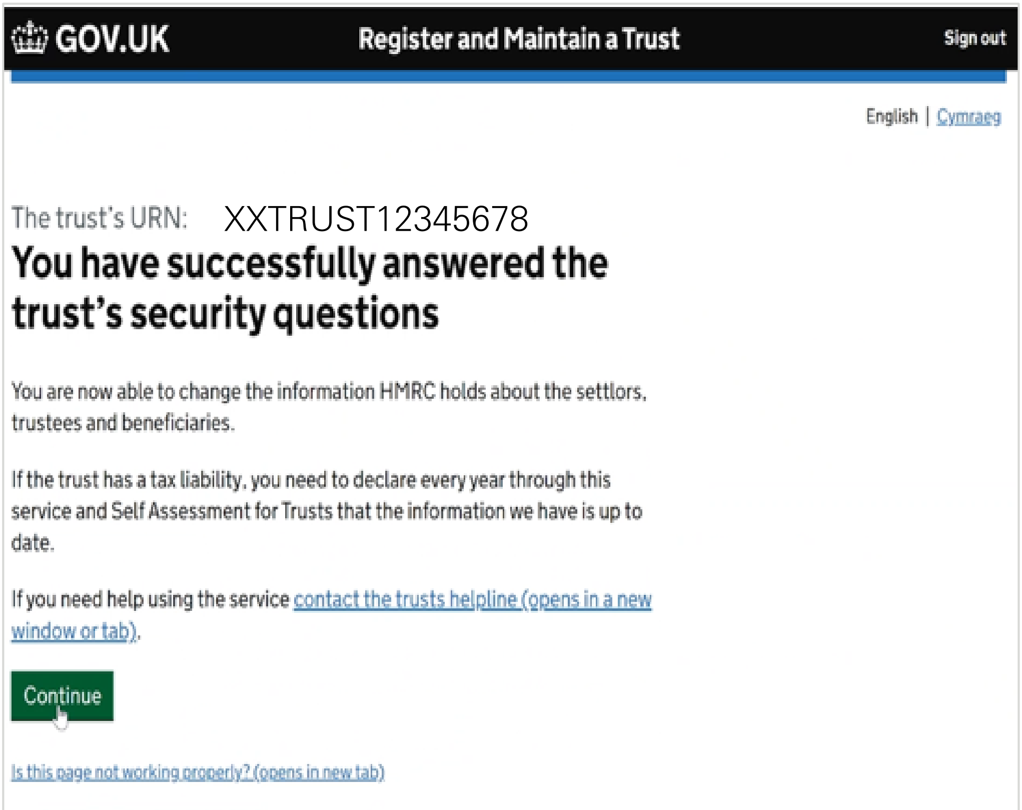
Stage 3 - Maintaining your trust including how to obtain your TRS certificate.





Once all of your security questions have been answered, you will be asked to confirm that they are correct before submitting.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.



Once you have satisfied HMRC's security you will receive this notification.

This page confirms that you are now able to update/change information about settlors, trustees and beneficiaries.

Please also note, that if your trust becomes taxable, the trustees will have to declare via this service and there will be a requirement to complete a tax return.

Select Continue to progress.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.

The next page offers the opportunity to review the last declaration that was completed by the trustee(s) of the trust.

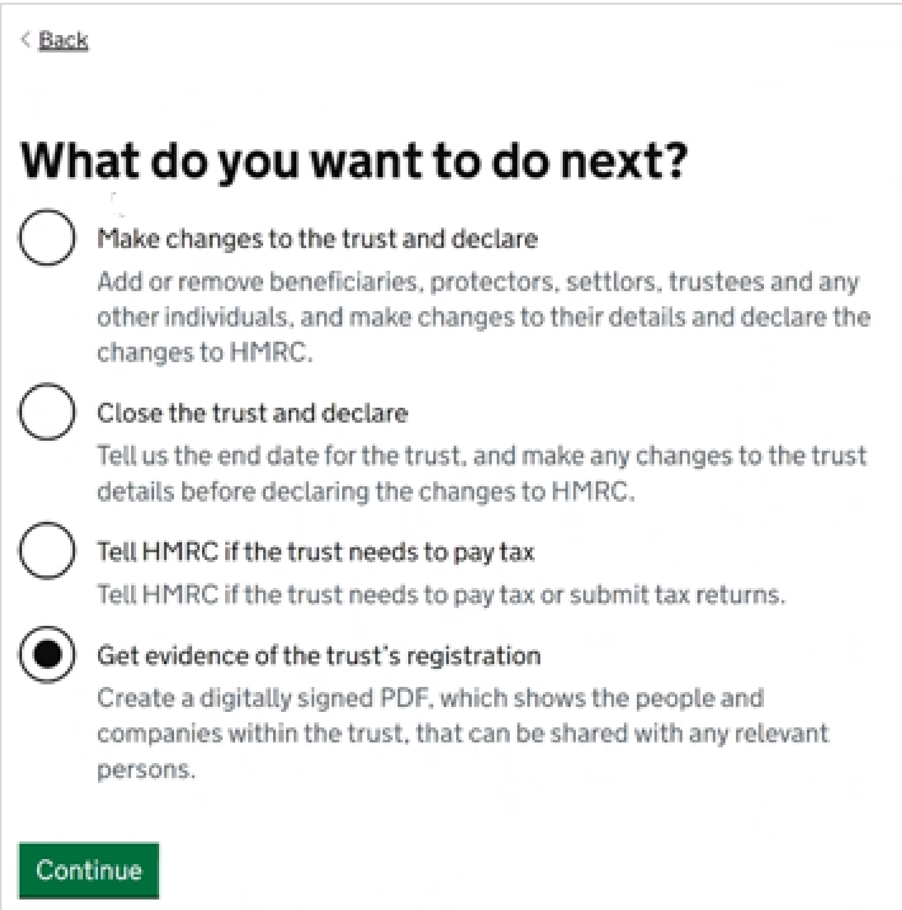
Please note: - **Trustees are required to complete a new declaration every time they make a change.**

If you are making changes to the trust then you are required to share them with the obliged entities, your financial adviser, and the product provider.

For the purpose of this guide we are obtaining **evidence of registration.**

Please select No and then Continue.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.


< Back

What do you want to do next?

- ( ) Make changes to the trust and declare
  Add or remove beneficiaries, protectors, settlors, trustees and any other individuals, and make changes to their details and declare the changes to HMRC.
- ( ) Close the trust and declare
  Tell us the end date for the trust, and make any changes to the trust details before declaring the changes to HMRC.
- ( ) Tell HMRC if the trust needs to pay tax
  Tell HMRC if the trust needs to pay tax or submit tax returns.
- (•) Get evidence of the trust's registration
  Create a digitally signed PDF, which shows the people and companies within the trust, that can be shared with any relevant persons.

Continue

The next page will offer 4 options (see opposite)

As you can see the options cover a broad range of things that a trustee may need to do.

On this occasion we need to select the ***Get evidence of the Trust's registration*** *which is the* 4th option.

Once you have selected that option please press the green **Continue**.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.

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Trust details PDF

Do you want to view evidence of the trust's registration?

You can download and view a PDF document that:

- shows the trust's registration
- shows the people and businesses listed within the trust

You can share this document outside of HMRC with any relevant person.

The document also shows the information held by HMRC about the trust's:

- beneficiaries
- lead trustee
- settlors
- trustees

Once you view the PDF of the trust's last declared details, you will not be able to view it again for another minute.

► Who are relevant persons?

Before you continue

If you need to make changes to the trust record, you need to do so before viewing the PDF.

The PDF of the trust's details will not be updated with any changes made until you:

- submit and declare the changes
- log out of the service, and then log back in

Yes No

Continue

The next page informs you of the information that you have submitted to and will be held by HMRC.

In the ***Before you continue section,*** you are reminded that if there are any alterations or changes to the trust then this should be done before selecting the **Yes and then Continue.**

The next page is an example of what the PDF Evidence will look like. We advise that it would be prudent to save it as a PDF or if preferred, print it off.

We strongly advise that this evidence is kept with all other relevant trust paperwork.

Please ensure that this evidence is shared with your Financial adviser and the product provider.

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.

Here is an example what evidence of the trust's registration that should be provided.

Trust register

HM Revenue & Customs

HM Revenue and Customs
Trusts
BX9 1EL

Date of issue
[illegible]

Our reference
[illegible]

The ABC Trust
1 [illegible] Street
London
W1 [illegible]

This document confirms that the trust named below has been registered on the Trust Registration Service in the United Kingdom. Details of the beneficial owners of the trust as held on the register are shown below.

Trust details

Full name of the Trust	The ABC Trust
URN	XXTRUST12345678
Trust start date	[illegible]
Date Trust last updated	[illegible]

Settlors

First Name	[illegible]
Middle Name	
Last Name	VADER
Date of Birth	[illegible]
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

Lead Trustee

First Name	[illegible]
Middle Name	
Last Name	VADER
Date of Birth	[illegible]
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

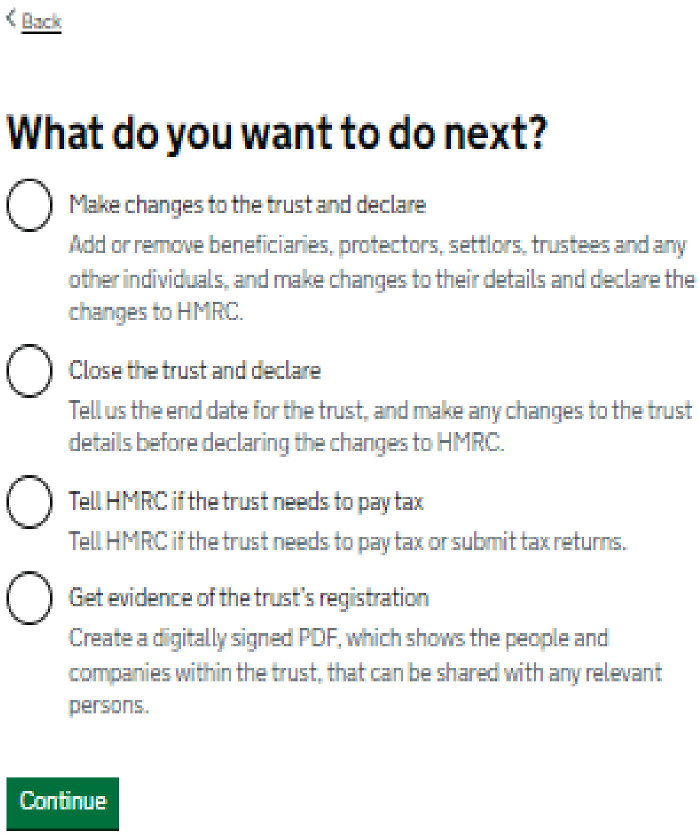
Trustees

First Name	HANS
Middle Name	
Last Name	LEIA
Date of Birth	01/1960
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

Beneficiaries

First Name	BEN
Middle Name	
Last Name	VADER
Date of Birth	01/1990
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

Stage 3 - Maintaining your trust including how to obtain your TRS certificate.



Back

What do you want to do next?

- Make changes to the trust and declare
  Add or remove beneficiaries, protectors, settlors, trustees and any other individuals, and make changes to their details and declare the changes to HMRC.
- Close the trust and declare
  Tell us the end date for the trust, and make any changes to the trust details before declaring the changes to HMRC.
- Tell HMRC if the trust needs to pay tax
  Tell HMRC if the trust needs to pay tax or submit tax returns.
- Get evidence of the trust's registration
  Create a digitally signed PDF, which shows the people and companies within the trust, that can be shared with any relevant persons.

Continue

To obtain the evidence you need to provide proof of your trust registration , then please **select option 4** and then the green continue button.

You should now be in possession of your evidence which you need to share with your obliged entities, - your financial adviser and the product provider.

In the future, there may be a requirement to make changes or even close the trust.

For further assistance with **How To Maintain Your Trust** then please use TRS Guide 4 which covers the questions for all the changes that a trustee may have to deal with during a trust's lifetime.

The Trust Registration Service

A Practical Guide to completing TRS registration

How to maintain your trust and to obtain evidence of its registration

We have come to the end of the third practical guide and we hope that it has assisted the trustee in completing the registration of their trust on the Trust Registration Service.

In this version you have been shown how to "Get evidence of the Trust's Registration" by using the Maintain Your Trust functionality.

Please note: We will review these guides as and when HMRC announce or make any significant changes to the TRS process that may materially affect the information in the practical guides that we have provided.

If you have any further questions then please use the HSBC life website: - www.life.hsbc.co.uk/customers/trs
Or the HMRC website: - www.gov.uk/guidance/register-a-trust-as-a-trustee

HMRC requires most trusts to be registered with the Trust Registration Service (TRS). In addition, the TRS must be updated with any amendments to the trust, including any change to trustees or named beneficiaries. A copy of the TRS certificate showing that the trust has been registered and/or updated must be provided to HSBC Life before this form can be processed. If you require further information about the TRS, including how to register, please visit our website: https://www.life.hsbc.co.uk/advisers/investment-advisers/trs/.