PAARL AFRICAN TRUST

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Dear Sir/Madam/Miss

Let us also ease your administrative frustrations

Trust Documents for Planning and Safe Keeping

We at Paarl African Group strive to work accurately and as completely as possible. We believe that every client of ours is as important to us as we are to ourselves and believe that no one is satisfied with sloppy work. Unfortunately, we are so dependent on you to provide us with your accurate information, otherwise there is going to be sloppy work.

There are also R88 billion in unclaimed financial assets, which include retirement benefits, bank accounts, investments and insurance payouts in South Africa. It is every person's own decision if they want to become part of these statistics.

We know that it is an unpleasant task for most people to send us all their documents, but we assure you that financially successful people practice very accurate record keeping and by doing so we can save you a lot in costs, taxes and precious time. Can you imagine that you suddenly need a personal, trust or company document or information and know that we are there to send it to you, without you having to make any further effort.

We require the following from each trustee and each beneficiary.

1. **Identity documents –** Colour copy, if you have a card ID, the front and back on one page in colour, with three signatures of yours on it. Colour lasts longer, let's do it once. We will swear it ourselves, so don't forward it as sworn.
2. **Proof of home address –** it must never be older than 3 months
3. **Tax number**

Then we need the following documents from the Trust:

1. **Trust deed, including the original registration date of the Trust.**
2. **Master's Letter of Authorization of the Trust**
3. **Proof of the Trust's Bank Account –** a letter that you can request on your bank application, make sure it is stamped, it must also not be older than three months
4. **Income Tax number of Trust –** SARS proof of income tax registration.
5. **VAT number of the Trust –** if any
6. **Financial Statements of the Trust**
7. **Assets and Liabilities of Trust –** we have an asset and liabilities document that you can just fill out.
8. **Share portfolios of Trust –** any shares and the amount you own
9. **Family's FICA / Children's birth certificates**
10. **Title deeds of Property(s)**
11. **Short Term Insurance Schedule and Claims History of Trust**
12. **Trust policies and investments –** we can request these with the authorizations you give us but will notify you if we cannot get certain information.

Many people do not even know where all these documents of theirs are, but with them in hand we can limit tax, estate, divorce, administration, and many other costs. We would like to exceed our clients' financial expectations.

Below is our QR Code with all our information on it, feel free to scan it to access it and you can even install it on your phone's home screen.

Kind regards

Hendrik Janse van Vuuren
Fiduciary Practitioner of South Africa® | Certified Financial Planner®
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