**Trust Information Sheet**

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| Name of trust |  |
| Purpose of setting up of a trust | *(Consider what is the intention and purpose of setting up a Trust and what does it try to achieve. For example, asset protection, inheritance, anonymity, income allocation - distribution, asset allocation etc. The Trust needs to be amended accordingly assigning adequate powers to the Settlor, the Beneficiaries, the Trustees and the protectors if applicable)* |
| Comments: |
| Purpose:  Asset protection, inheritance, and income allocation - distribution purposes |
| Comments: |
| Additional notes:   1. Settlor will only be creating the trust - It will not be included as one of the beneficiaries – will be able to make/receive loans in case needed |
| Comments: |
| 1. Trustees will manage assets and income distribution by exercising their discretion – i.e., discretionary trust |
| Comments: |
| 1. Appointment of a Co-trustee. If yes how the decisions will be taken, Alone, Mutual, Depending on the transaction etc |
| Comments: |
| 1. Pursuant to points 2 and 3 above actions will also be subject to protector consent – Vetoing etc. |
| Comments: |
| 1. Protector will have the right to be remunerated. Decision on remuneration amount should be taken by mutual consent between the trustee and the protector |
| Comments: |
| 1. Beneficiaries (please refer to settlor wishes section) |
| Comments: |
| 1. Other – please specify |
| Comments: |
| Trust period | *(State if the trust is for a fixed period**or subject to any condition of termination)* |
| Comments:  Example: The trust will not be for a fixed period or subject to any condition of termination |
| Trust assets | *(Give details of all assets to be settled, their origin and country involved)* |
| Comments:  *Acknowledgement:* To the best of settlor knowledge, the transaction is not affected by any Law in respect of settlor or beneficiaries’ country of residence in relation to inheritance law or any other form of succession law |
| Settlor wishes | *(Provide settlor’s wishes concerning the distribution of the trust property and any other matter that the trustee must be aware of in connection with the trust property and the beneficiaries). (A separate statement of wishes shall be prepared and signed by the settlor once the Trust deed has been formed)* |
| Comments: |
| 1. Settlor: Can make/receive loans from trust |
| Comments: |
| 1. Spouse: Will have Income allocation rights but no asset rights |
| Comments: |
| 1. Beneficiaries: Will have income allocation rights but no asset rights allocation. Spouse or relatives other than children, will be having no rights |
| Comments: |
| 1. Other – please specify |
| Comments: |
| Name of trustees | Trustee 1: Rightax Ltd |
| Trustee 2: |
| Trustee 3: |
| Name of Protector(s) – (if applicable) | Protector 1: |
| Protector 2: |
| Settlor (creator of the trust) | Name: |
| Occupation: |
| Nationality (passport): |
| Beneficiary 1 | Name: |
| Relationship with settlor: |
| Nationality (passport): |
| Copy of passport/identity card: |
| Type of trust benefit:  Example- Access to income only. Should he/she wish to access capital, detail proposal must be made for the attention of the Trustees |
| Beneficiary 2 | Name: |
| Relationship with settlor: |
| Nationality (passort): |
| Copy of passport/identity card: |
| Type of trust benefit:  Example- Access to income only. Should he/she wish to access capital, detail proposal must be made for the attention of the Trustees |
| Beneficiary 3 | Name: |
| Relationship with settlor: |
| Nationality (passort): |
| Copy of passport/identity card: |
| Type of trust benefit:  Example- Access to income only. Should he/she wish to access capital, detail proposal must be made for the attention of the Trustees |
| Beneficiary 4 | Name: |
| Relationship with settlor: |
| Nationality (passort): |
| Copy of passport/identity card: |
| Type of trust benefit:  Example- Access to income only. Should he/she wish to access capital, detail proposal must be made for the attention of the Trustees |
| Bank of the trust (Local or overseas bank – optional  (Recommended as it enhances Cyprus trust substance) | Bank name: |
| Type of bank account: |
| Bank account currency: |
| Initial amount to be deposited after the creation of the trust: |
| Record keeping and financial statements | *(Record keeping and financial statements should be kept and prepared by the trustee if for example the Trustees’ powers are particularly important in distributing the wealth of the property to the beneficiaries during their lifetime)* |
| *Comments:* |
| *Frequency of record keeping and financial statements preparation:*  *State how often the reporting should take place:* |
| *Comments:*  (Recommended at least yearly) |
| *Distribution list of Persons whom will reporting be received:* |
|  |
| Number of Trust deed Original Copies to be delivered | For example, one original for each party |
| For completing the trustee Recurring Action Sheet, describe the various actions to be taken over by our firm as trustees throughout a calendar year | *Comments:* |

**Declaration of Settlor or person or firm requesting creation of the trust**

I/We, the undersigned, being the Settlor(s)/acting as agent for the Settlor(s) of the proposed trust, request that Rightax Ltd proceed with the creation of the trust, and declare that the above particulars are true to the best of my/our knowledge and belief. I/We further declare that none of the beneficiaries, nor the Settlor, has, in any part of the world, been involved in any illegal activity, been declared bankrupt or has been a director or otherwise concerned in the management of any company which has been subject to an insolvent liquidation.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_