

IMPORTANT: Save this form to your computer before completion. Online completion cannot be saved.



Membership Application Form

Applicant Company Name

Registered Address

Contact Address

(if different)

Main Telephone

Company Website Address

Parent Organisation/Owner

(if different)

Type of Membership Required

(tick just one)

Full

Associate*

Professional

*Associate Membership is available for additional trust companies owned by the same organisation

Main Areas of Practice

(tick all that apply)

Pensions

Private Trusts

Loan Capital

TACT requires details of two contacts in your organisation. Please confirm:

Main Contact

Name

Email address

Direct Telephone

Mobile

Second Contact

Name

Email address

Direct Telephone

Mobile

Membership Application Form (continued)



Staff

Please describe the seniority, length of service, qualifications and experience of the executive staff directly involved with the trusteeships of the applicant:

Trusteeships

Please provide the following information:

Approximate value of assets held by the applicant as trustee

Number of trusteeships/trusts administered

Insurance

Level of professional indemnity cover of the applicant

Capital Resources

Amount of paid up share capital as at

Value of shareholders' funds on last balance sheet

Corporate Structure

Is the company structured as a Trust Corporation? Yes No

Board Members of the Applicant

Do any have criminal convictions? Yes No

Have any been disqualified or suspended as a charity trustee, pension scheme trustee or company director? Yes No

Have any been rejected by a regulatory body? Yes No

By ticking this box you confirm that your organisation applies for membership of TACT- The Association of Corporate Trustees and agrees to Observe the Constitution, Articles of Association and Code of Practice and pay such subscriptions as are fixed by the Council and that the sender is authorised by the company to submit these details and commit the applicant to membership.

Please save and email the completed form to:

chiefexec@tact.uk.net

Or post to:

TACT - The Association of Corporate Trustees
c/o Castlewood Trust & Company Limited
9 Devonshire Square, London, EC2M 4YF