

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



Membership Application Form

1. Applicant Company Name

2. Registered Address

3. Contact Address

(if different)

4. Main Telephone

5. Company Website Address

6. Parent Organisation/Owner

(if different)

7. Type of Membership Required

(tick just one)

Full

Associate*

Professional**

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

**Professional Members should only complete sections 1-10, 16 & 17.

8. Main Areas of Practice

(tick all that apply)

Pensions

Private Trusts

Loan Capital

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

9. Main Contact

Name

Email address

Direct Telephone

Mobile

10. Second Contact

Name

Email address

Direct Telephone

Mobile

Membership Application Form (continued)

11. Staff

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

12. Trusteeships

Please provide the following information:

Approximate value of assets held by the applicant as trustee

Number of trusteeships/trusts administered

13. Insurance

Level of professional indemnity cover of the applicant

14. Capital Resources

Amount of paid up share capital

as at

Value of shareholders' funds on last balance sheet

15. Corporate Structure

Is the company structured as a Trust Corporation?

Yes

No

16. 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

17. Declaration

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 (or Professional Member Rules) 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