Trust Administration

Becoming a Client

ProTrust
Trust Administration

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Do you need:

One piece of advice for you as Trustees?

Or ongoing management services?

Whatever your requirements, we are here to help.

Advice Work

This may be a request to look at one particular aspect or approach. It can be to assist in resolving a contentious issue between trustees or to give some advice in dealing with methods to optimise distributions to beneficiaries.

Advice support may include advising on:

- Trust Registration Service (TRS) registration;
- Trust taxation;
- administration requirements for a Trust;
- a request for removal of a property restriction to allow a sale of a property to proceed;
- the reasons for the Trust and assessing options for continuing with the Trust or bringing it to a conclusion;
- Trusteeship responsibilities under the Trustee Act 2000;
- how to remove or retire off a Trustee or appoint a new Trustee;
- the best way to approach dealing with a difficult or needy beneficiary;
- merits/disadvantages of investing small money Trusts;
- the usual cost/time of Trust administration duties;
- the Inheritance Tax implications of a Trust with regard to a particular beneficiary;
- how best to hold or own property assets in the Trust.

Trust Management Service

This is a complete service to fully discharge the trustees legal roles and responsibilities. Primarily it is to ensure that expertise and experience is brought to the role but also it allows trustees (particularly lay trustees) to free up their time for all of their other responsibilities and duties.

Our ongoing service includes:

- All trustee due diligence processes to discharge your trustee role;
- Trust Registration and annual updates at the TRS;
- Liaising with beneficiaries as to distributions/needs & requirements;
- Trustee meetings/Minutes;
- Trust Accounts;
- Arranging Trust tax returns;
- Reviewing FATCA requirements for trustees;
- Updating and annual review of trustee investment policy statements;

As to how we work with you, the choice is yours.

Becoming a Client

What you can expect from us

- Expertise and experience in the administration of trusts.
- Fast and reliable service.
- A sensible, structured approach to reviewing your arrangements so that you are kept up to date.
- Transparency: from taped meetings of advice, to transparent fixed fee cost options for each and every type of work we undertake.
- Expert knowledge of other good professionals such as financial advisors, solicitors, accountants and for property conveyancing. We can point you in the right direction based on experience of what it takes to be a trusted advisor.
- The drive to always exceed your expectations and such that you may recommend our services to your friends, family and connections.

What are we striving to achieve for you?

- Simple, stress-free management of the Trust
- Clear understanding of Trustees duties and powers.
- To have open dialogue so that you are free to give valuable feedback to us on our service.
- To give you the trust and faith in our advice and strategy so that you help us help you to work within time frames and next stages we plan with you.
- Overall, to have Trustees who are happy in their roles.
- Likewise, to have trust beneficiaries who are happy with the service that the Trustees provide to them and through our advice and assistance.

Contact Us

For more information and for an initial discussion for advice please contact us on:

Email: info@protrustconsulting.co.uk

Telephone: 0207 113 5760