



Using the Trust Registration Service (TRS): How to obtain Proof of Registration

When a trustee enters a business relationship, for example: a trustee opens a bank account or places money into an insurance policy, the Trustee needs to provide Proof of Registration to the bank or financial institute to confirm that the trust is registered, and that the details that have been registered are correct.

If details of the trust are changed, for example: change to trustee or if there is a withdrawal request, a new Proof of Registration document needs to be sent to the bank or building society.

Creating the Proof of Registration document

1. Open a search engine, for example Google or similar.
2. Type in 'gov.uk maintain a trust'.
3. Click the search result, 'Manage your trust's details – GOV.UK'.
4. Please read the information on the page.
5. Towards the end of the page, click on the green box that says, 'start now'.
6. Enter the Government Gateway user ID and password used to set up the trust.
7. You will be asked whether an agent is managing the trust online. Select 'no' if you are managing the trust yourself or 'yes' if you have an agent managing it on your behalf.
8. You will then see an information page asking some security questions about the trust – these will be about information added at the time of registration (or potentially from any previous changes).
9. Click 'continue' and answer the three questions. You will be presented with a summary of your answers to check. Click 'submit' to confirm.



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10. If security is passed, you will receive a prompt to say you have successfully claimed the trust – click ‘continue’.

- If you have any issues with the above, please request ‘claim a trust’ instructions, also available from HMRC.
- Call our helpline on 0300 123 1072 or email trustenquiries@hmrc.gov.uk

11. You will receive a prompt screen about maintaining a trust – click ‘start maintaining this trust’.

12. The first question will be ‘Do you want this to be the trust’s last declaration’? You should select ‘no’ and then ‘continue’.

13. You will be asked what you want to do next?

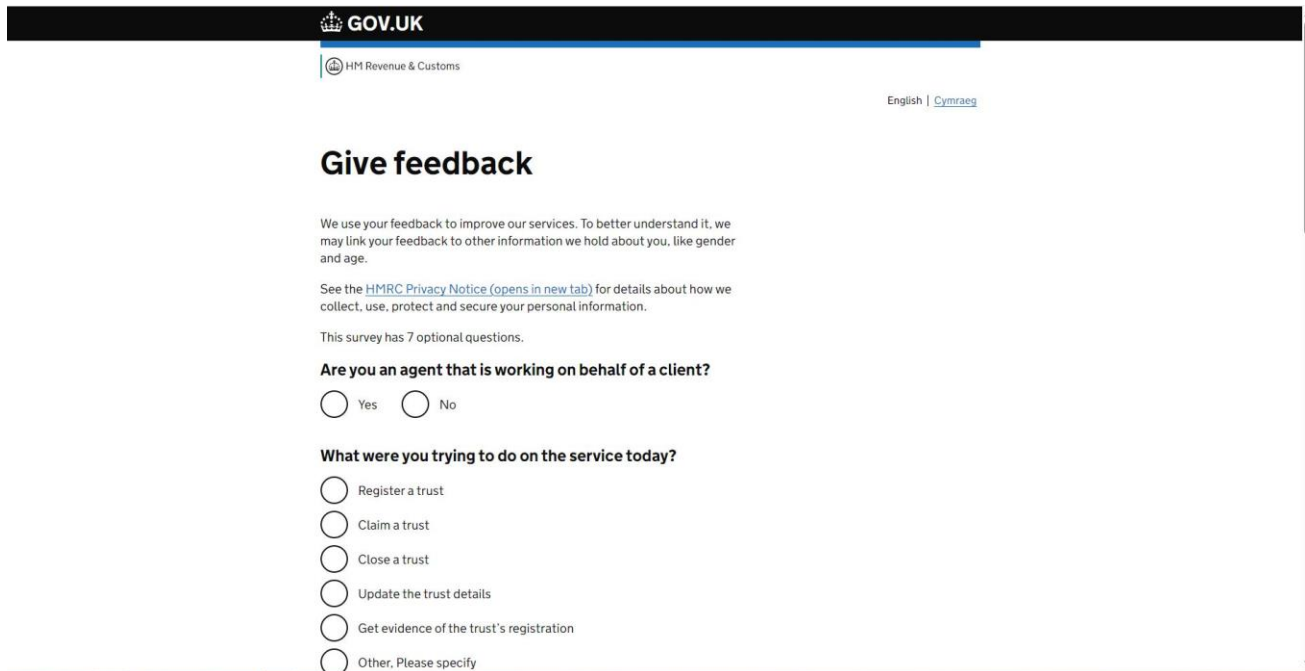
The screenshot shows the HMRC Trust Registration Service (TRS) interface. At the top, there is a black navigation bar with the HMRC logo, the text 'GOV.UK', 'Register and Maintain a Trust', and a 'Sign out' link. Below the navigation bar, there is a blue horizontal line. On the right side, there is a language selector showing 'English' and a link to 'Cymraeg'. On the left side, there is a '< Back' link. The main content area is titled 'What do you want to do next?' and contains four radio button options:

- Make changes to the trust and declare
Add or remove beneficiaries, protectors, settlors, trustees and any other individuals, and make changes to their details and declare the changes to HMRC.
- Close the trust and declare
Tell us the end date for the trust, and make any changes to the trust details before declaring the changes to HMRC.
- Tell HMRC if the trust needs to pay tax
Tell HMRC if the trust needs to pay tax or submit tax returns.
- Get evidence of the trust’s registration
Create a digitally signed PDF, which shows the people and

Select ‘Get evidence of the trust’s registration’ and click ‘continue’.

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14. You will be taken to a screen with the title 'Give feedback'.



The screenshot shows the 'Give feedback' page on the GOV.UK website. The page header includes the GOV.UK logo and 'HM Revenue & Customs' on the left, and 'English | Cymraeg' on the right. The main heading is 'Give feedback'. Below this, there is a paragraph explaining that feedback is used to improve services and may be linked to other information. A link to the 'HMRC Privacy Notice' is provided. It states that the survey has 7 optional questions. The first question is 'Are you an agent that is working on behalf of a client?' with radio buttons for 'Yes' and 'No'. The second question is 'What were you trying to do on the service today?' with radio buttons for 'Register a trust', 'Claim a trust', 'Close a trust', 'Update the trust details', 'Get evidence of the trust's registration', and 'Other, Please specify'.

15. You might think you've gone too far, you haven't. In the top right corner of this screen your document will appear to download – click on the download to obtain a PDF copy of your Proof of Registration.