

**Step-by-step guide to  
downloading the  
'Proof of registration'  
document**

**November 2022**

**WESLEYAN**  
*we are all about you*

## **Content**

- 1. Using the on-line service**
- 2. Accessing the trust account**
- 3. Downloading the 'proof of registration' document**

## 1. Using the on-line service

- a) Search “manage your trust’s details” or follow this hyperlink [Manage your trust's details - GOV.UK \(www.gov.uk\)](https://www.gov.uk/manage-your-trusts)


https://www.gov.uk › Trusts and Estates

### Manage your trust's details - GOV.UK

Use **the** online service to update **details** of **your trust**, declare no changes, authorise an agent, get proof of registration or close **a trust on the trust ...**

[Check the date you registered...](#) · [Updating your trust's details](#) · [Closing a trust](#)

- b) The instructions are set out on this page

 **GOV.UK** ▼ Top

[Home](#) > [Trusts and Estates](#)

Guidance

## Manage your trust's details

Use the online service to update details of your trust, declare no changes, authorise an agent, get proof of registration or close a trust on the trust register.

- c) In the contents page you will see a link to ‘Get proof of registration’ which then gives an overview of the requirements

Contents

- [Check the date you registered a trust](#)
- [Updating your trust’s details](#)
- [Lead trustee accessing a trust](#)
- [Closing a trust](#)
- [Changing the trust from non-taxable to taxable](#)
- [Get proof of registration](#)
- [Deadlines](#)
- [Claiming a trust and authorising an agent to access the trust](#)
- [Using the online service](#)

## 2. Accessing the trust account

- a) Go to the bottom of the page 'Using the online service' and press start now

### Using the online service

Before you can view, update the details, or authorise an agent, you'll need the 'Organisation' Government Gateway user ID and password you used when you registered the trust. If you do not have one, you can create one the first time to go into the service.

**Start now >**

- b) You will be prompted to sign into the Trust's Government Gateway account. Each trust has a unique Government Gateway ID. Enter the details and sign in.

### Sign in using Government Gateway

Government Gateway user ID  
This could be up to 12 characters.

Password

**Sign in**

- c) Once you have completed the sign in, you will be sent an 'access code' via the method chosen when you set up the account (Text message, Voice Call or Authenticator App for Smartphone or Tablet). Insert the code and press continue



### Enter the access code

We have sent a 6 digit access code to \*\*\*\*\*0526

It may take a few minutes to arrive

If you have a UK mobile your 6-digit code will arrive from the phone number 60 551.

Access code

Remember me for 7 days

Problems receiving this code? [You can get help](#)

**Continue**

- d) After logging in you will receive the following message. Press continue

This trust's URN: XMTRUS [REDACTED]

## Maintain this trust

The trust with the Unique Reference Number (URN) XMTRUS [REDACTED] has been linked with this account.

You can add, remove and update settlors, trustees, beneficiaries, protectors and other individuals in this trust. Your changes will not be saved until you have declared.

If you need to register or maintain another trust, you will need to use another Government Gateway account.

If you need help using this service [contact the trust helpline \(opens in a new window or tab\)](#).

[Continue](#)

- e) If you are the lead trustee (and not a tax agent) you should answer 'No'

[< Back](#)

The trust's URN: XMTRUST8 [REDACTED]

## Is an agent managing the trust's online register for the trustees?

Yes
  No

[Continue](#)

[Is this page not working properly? \(opens in new tab\)](#)

- f) The next screen informs you that you will need to answer further questions relating to the parties to the trust and you should ensure the information entered is accurate. Press continue.

[< Back](#)

The trust's URN: XMTRUS [REDACTED]

## Before you continue

You will be asked to answer several questions about the trust. This is so we can confirm you are authorised to view and amend the trust's details.

Your answers must match the details provided to HMRC when the trust was registered or most recently updated online.

Do not enter any other details when answering these questions, even if someone from the trust wrote to HMRC to change them.

If you need help using the service [contact the trusts helpline \(opens in a new window or tab\)](#).

[Continue](#)

[Is this page not working properly? \(opens in new tab\)](#)

- g) Enter the details as prompted and press continue.

## What is the lead trustee's last name?

This is the person who gets the official documents for the trust. For example, the notice to file tax returns.

Continue

[Is this page not working properly? \(opens in new tab\)](#)

- h) Enter the details as prompted and press continue.

[< Back](#)

## What is the lead trustee's date of birth?

It must match the date provided to HMRC when the trust was registered. For example, 31 3 1980.

Day	Month	Year

Continue

- i) Enter the detail as prompted and press continue.

[< Back](#)

## What is the lead trustee's National Insurance number?

It will be on a National Insurance card, benefit letter, payslip or P60. For example, 'QQ 12 34 56 C'.

Continue

- j) Check that the information is correct and amend if necessary (using the [Change](#) hyperlinks). Then press continue

< [Back](#)

## Check your answers before continuing

**Lead trustee**

Last name	sands	<a href="#">Change</a>
Date of birth	06 April 1974	<a href="#">Change</a>
National insurance number	[REDACTED]	<a href="#">Change</a>

Check your answers to make sure they match the information HMRC holds on the trust. If they do not match you will not be able to access the trust details.

[Continue](#)

- k) Now enter the details of another person associated with the trust. This cannot be the lead trustee, but it should be somebody who has been specifically named, such as the settlor or another trustee. Then press continue

< [Back](#)

## Enter the details of a person associated with this trust

This cannot be the lead trustee.

**First name**

**Last name**

**Date of birth**  
It must match the date provided to HMRC when the trust was registered.

Day    Month    Year

[Continue](#)

- l) Check that the information is correct and amend if necessary (using the [Change](#) hyperlinks). Then press continue

## Check your answers before submitting

**Lead trustee**

Last name	sands	<a href="#">Change</a>
Date of birth	██████████	<a href="#">Change</a>
National insurance number	██████████	<a href="#">Change</a>

**Person associated with the trust**

First name	susan	<a href="#">Change</a>
Last name	sands	<a href="#">Change</a>
Date of birth	██████████	<a href="#">Change</a>

Before you submit your answers, you must confirm they are correct.

If they do not match the information HMRC holds, you will not be able to access the trust details.

[Submit](#)

- m) Once you have successfully completed the security questions you can continue to the next stage.

The trust's URN: XMTRUS ██████████

## You have successfully answered the trust's security questions

You are now able to change the information HMRC holds about the settlors, trustees and beneficiaries.

If the trust has a tax liability, you need to declare every year through this service and Self Assessment for Trusts that the information we have is up to date.

If you need help using the service [contact the trusts helpline \(opens in a new window or tab\)](#).

[Continue](#)

[Is this page not working properly? \(opens in new tab\)](#)



### 3. Downloading the ‘proof of registration’ document

- a) To access the proof of registration document, begin by pressing the ‘Start maintaining this trust’ button.

This trust's URN: XMTRUS [REDACTED]

## Maintaining this trust

### Updating the trust's details and making a declaration

This service will allow you to make changes to the trust details.

Once you have made changes, you need to:

- submit any updates to us, so we can update the trust's record
- declare that the information we have about the trust is accurate and up to date

**!** If you do not submit the changes and declare that the information is up to date then the changes to the trust will not be saved.

You can return to the service and update the trust's details at any time.

You can print a copy of your draft answers as well as a copy of the declaration.

[Start maintaining this trust](#)

[Is this page not working properly? \(opens in new tab\)](#)

- b) If you wish to check the details on the trust declaration for accuracy, answer Yes to this question, otherwise answer No. Then press continue

[< Back](#)

This trust's URN: XMTRUS [REDACTED]

## Do you want to view this trust's last declaration?

Details declared to HMRC about the settlors, trustees, beneficiaries and if added, protectors and other individuals.

Yes  No

[Continue](#)

[Is this page not working properly? \(opens in new tab\)](#)

- c) Select the 'Get evidence of the trust's registration' button and press continue.

[< Back](#)

## What do you want to do next?

- 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 companies within the trust, that can be shared with any relevant persons.

[Continue](#)

- d) If you are satisfied that the trust details are correct, select Yes and press continue.

[< Back](#)

Trust details PDF

## Do you want to view evidence of the trust's registration?

You can download and view a PDF document that:

- shows the trust's registration
- shows the people and businesses listed within the trust

You can share this document outside of HMRC with any relevant person.

The document also shows the information held by HMRC about the trust's:

- beneficiaries
- lead trustee
- settlors
- trustees

Once you view the PDF of the trust's last declared details, you will not be able to view it again for another minute.

▶ [Who are relevant persons?](#)

### Before you continue

If you need to make changes to the trust record, you need to do so before viewing the PDF.

The PDF of the trust's details will not be updated with any changes made until you:


- submit and declare the changes
- log out of the service, and then log back in

Yes     No

[Continue](#)

- e) The system will automatically download a pdf copy of the 'proof of registration' in a recognised format as per the extract below. Save a digital copy of the pdf to your documents folder.

## Trust register



HM Revenue  
& Customs

HM Revenue and Customs  
Trusts  
BX9 1EL

Date of issue  
09/11/2022

Our reference  
[REDACTED]

[REDACTED] Family Trust One  
[REDACTED] Park

This document confirms that the trust named below has been registered on the Trust Registration Service in the United Kingdom. Details of the beneficial owners of the trust as held on the register are shown below.

### Trust details

Full name of the Trust	[REDACTED] Family Trust One
URN	[REDACTED] 19
Trust start date	10/08/2021
Date Trust last updated	31/08/2022

### Lead Trustee

First Name	[REDACTED]
Middle Name	[REDACTED]
Last Name	[REDACTED]
Date of Birth	[REDACTED] 1958
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

### Trustees

First Name	[REDACTED]
Middle Name	[REDACTED]
Last Name	[REDACTED]
Date of Birth	[REDACTED] 1971
Country of residence	UNITED KINGDOM
Nationality	UNITED KINGDOM

SMID-Obliqed Entity letter

Page 1

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