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

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WESLEYAN
we are all about you



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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 > 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



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



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.



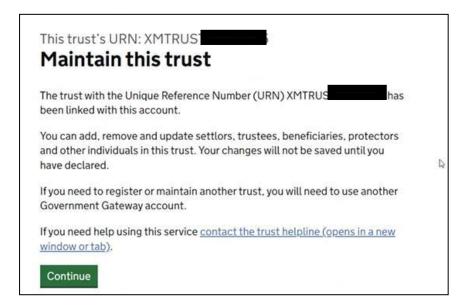
b) You will be prompted to sign into the Trust's Government Gateway account. Each trust has a unique Governmennt Gateway ID. Enter the details and sign in.



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



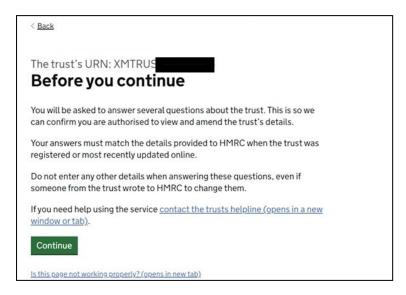
d) After logging in you will receive the following message. Press continue



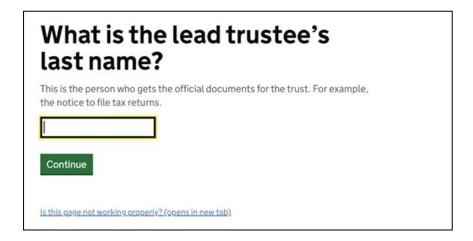
e) If you are the lead trustee (and not a tax agent) you should answer 'No'



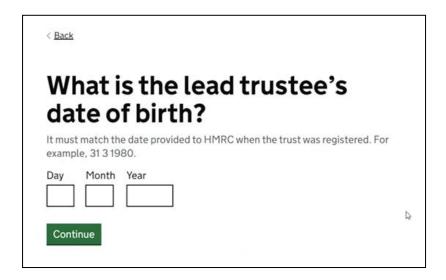
f) The next screen informs you that you will need to answer further questions relating to the parties to the trust and you should ensure the information entered is accurate. Press continue.



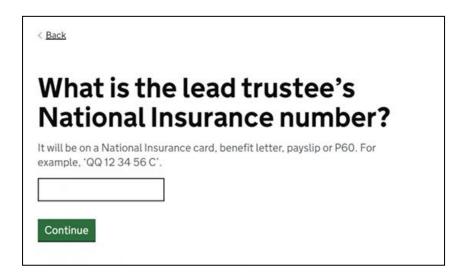
g) Enter the details as prompted and press continue.



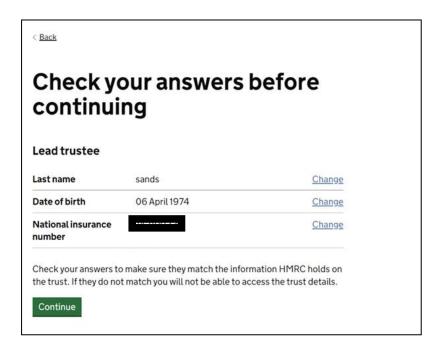
Enter the details as prompted and press continue.



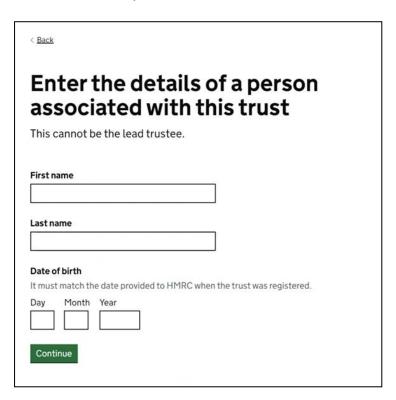
i) Enter the detail as prompted and press continue.



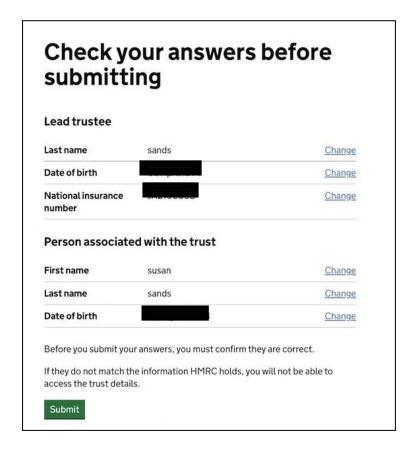
j) Check that the information is correct and amend if necessary (using the <u>Change</u> hyperlinks).
 Then press continue



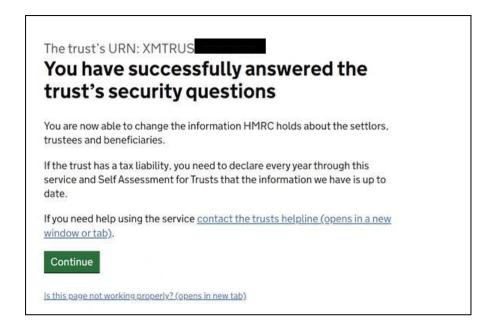
k) Now enter the details of another person associated with the trust. This cannot be the lead trustee, but it should be somebody who has been specifically named, such as the settlor or another trustee. Then press continue



Check that the information is correct and amend if necessary (using the <u>Change</u> hyperlinks).
 Then press continue

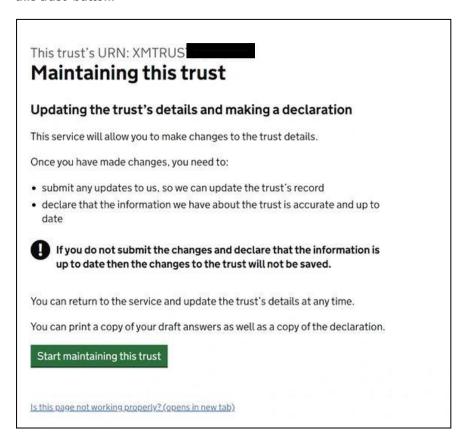


m) Once you have successfully completed the security questions you can continue to the next stage.

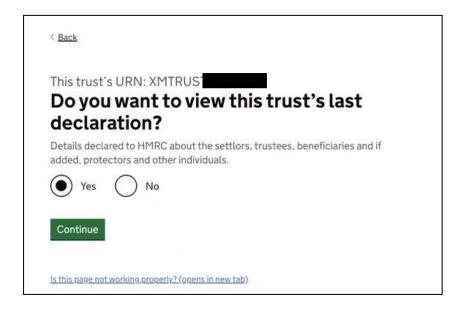


3. Downloading the 'proof of registration' document

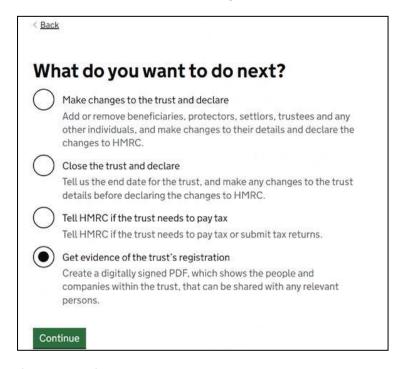
a) To access the proof of registration document, begin by pressing the 'Start maintaining this trust' button.



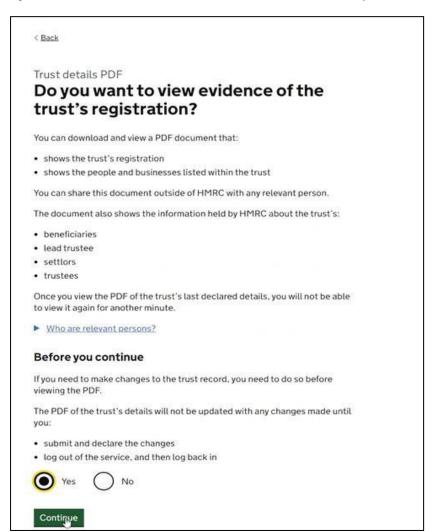
b) If you wish to check the details on the trust declaration for accuracy, answer Yes to this question, otherwise answer No. Then press continue



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



If you are satisfied that the trust details are correct, select Yes and press 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.

