

*To be completed by a registered accountant or lawyer and placed on their firm's letterhead
incl Full legal name, address and contact details to be clearly displayed*

[Date - 01/01/2000]

Attestation of Trust Deed Details

Ref: [NAB customer reference number, if any]

Re "Trust": [Full customer legal name and ABN (if any) – ABC Pty Ltd ATF the XYZ Trust, ABN XXX XXX XXX]

[Name of Firm] acts on behalf of the [Name of Trust] listed above (the **Trust**).

We/I declare that [Name of Firm] have sighted an original and/or certified copy of the trust deed, and any Variations to the deed for [Name of Trust].

We/I attest to the following current details of the Trust:

- [Full legal name of trust:]
- [Trustee(s): *For individuals, please provide the full legal name, date of birth and residential address. For non-individuals, please provide the full legal name and Government issued Identification Number (ACN, ARBN or ABN) and address.*]
- [Trust ABN (if applicable):]
- [Settled Sum: *If the settled sum is \$10,000 or more, please provide the full legal name, date of birth and residential address of the Settlor. For Settlers that are non-individuals, please provide the full legal name, Government issued Identification number (CAN, ARBN or ABN) and address*]
- [Trust Type:]
- [Country in which the trust was established:]
- [Beneficiaries (if any): *For individuals, please provide the full legal name, date of birth and residential address. For non-individuals, please provide the full legal name, Government issued Identification Number (CAN, ARBN or ABN) and address.*]
- [Main activity of the trust: *Describe in a few words, for example: asset investment, property investment. Where the main activity of the trust is for business purposes, please provide the full business name of the trustee (not the legal company name), as is registered with the Australian Business Register (ABR).*]

Regards,

[Signature]

[Full name – Alice Accountant]

[Role – Director]

[Registration, accreditation, identification, or membership number – Charter Accountant Member Number – XXXXXX]

Instructions:

To meet our regulatory obligations, we are required to collect trust information and verify its terms by obtaining a copy of the trust deed.

The above 'Attestation of Trust Deed Details' attestation is for the use of a registered accountant or lawyer. **It can only be used where the attesting accountant/lawyer has already sighted an original or certified copy of the trust deed.**

Where NAB has requested a full copy of the trust deed including any amending deeds or variations, this template can't be used in its place, unless a valid copy can't be found or accessed.

The accountant/solicitor must:

1. Attest that they have sighted an original and/or certified copy of the Trust Deed, including any Variations to the deed.
2. Provide the current details of the trust included within the above 'Attestation of Trust Deed Details' template letter as applicable. *If a valid copy of the trust deed can't be found or accessed and this attestation is being provided in its place, all details listed must be provided.*
3. Provide their own details as the attesting accountant/lawyer, including full name, role/title, and accreditation (e.g. CPA or CA...) and registration number.
4. Include information about the accountant/solicitor's firm, including full legal name, ACN, address and contact details (i.e. letterhead or within an email signature).
5. Date the communication, and if a letter, provide their signature.

This attestation can be provided to the email address listed in our original correspondence as an email, or attached as a letter:

- **Email:** emailed from the attesting accountant/lawyers business email address, it must contain all required details within the Attestation template, including details of the accountant/lawyer's firm clearly displayed within the email signature. This email can be forwarded from the customer or sent directly to NAB if the customer reference number is included.
- **Letter:** emailed as a letter attachment, it must contain required details in the Attestation template, be placed on the attesting accountant/lawyer's firm letterhead and include their written signature.