



CHECKLIST FOR FORMATION & REGISTRATION OF TRUST

Following are the Documents & Information required for Formation of Society / Trust

Sr. No.	Particulars	Particulars
A	Preparation of the Trust Deed	Trust deed is non mandatory, but is desired as it is enforceable by law.
1	Parties to the trust	3 parties required for the formation.
1a	Applicant /Author of the trust	Author is the person who declares confidence in the Trust. Name & Address of the author.
1b	Details of trustees /Members	Trustee should not be a minor & be of sound mind. Full Name , Address , Occupation & Age. Designations of the Trustees / Members .
1c	Beneficiary of the Trust	Person who is going to be benefitted by the formation of trust. Usually Author himself is the Beneficiary or it is public at large .
2	Objects of the Trust/Society	Detailed object of the Trust is to be mentioned. Trust can be formed for charitable purposes only
3	Subject matter	The subject matter of the trust is the property in respect of which the trust has been created. For creating a valid trust, the subject matter should be defined with certainty and such property should be capable of disposition.
B	Registration of the trust by Trust Deed	Registration is not compulsory but is needed to get the trust registered under the Income Tax Act for availing the exemptions and more over a deed is a prima facie evidence of the existence of a trust.
1	Name of the Society/ Trust	Give atleast 3 options in the order of preference
2	Address for correspondence & Evidence	Recent Mseb Bill/ Telephone Bill/ Property Card of the Trust location .
3	Tenure of Trustees	Max 5 Years & Min 1 year .
4	Minimum and Maximum Number of Trustees	Minimum : 7 Maximum : 25

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5	Who should operate bank account	Proposed Member's specimen signature. Minimum 2 members should specify.
6	Colour Photograph of applicant & identity proof	Photograph's of the Author , Trustees .
7	Declarations to be Made	Regarding the rights & duties of the Trustees & Beneficiary .
8	Specific clauses related to Trust	The procedure for appointment, removal or replacement of a trustee . The mode and method of determination of the trust. A draft Trust Deed shall be provided by us.

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For any further assistance contact us