



Trust Registration Service Guide

(Full Guide)

To start the registration process, go to web address:

<https://www.gov.uk/guidance/register-a-trust-as-a-trustee>

Need help?

Call us on 01953 851151

Or Email at info@hfp.co.uk

Scroll all the way down and select Register Now.

Note: This needs to be an organisation Gateway User and Password.

How to register

Before you can register a trust as a trustee, you need to have an Organisation Government Gateway user ID and password. If you do not have one, you can create one the first time you register. You'll need a Government Gateway user ID for each trust you want to register.

You'll need:

- an email address (this will be linked to the trust's Government Gateway account)
- your full name



Register now >

Select: Create sign in details.

Sign in using Government Gateway

Government Gateway user ID

This could be up to 12 characters.

Password

Sign in

[Create sign in details](#)

Enter your e-mail address and
press continue.

Enter your email address

This will only be used to send you security updates or if you need to recover
your sign in details.

To confirm it is your email address we will send you a code.

Email address

Continue

Enter the code that has been e-mailed to you.
The code is valid for 30 minutes. Click Confirm then
Click continue.

Enter code to confirm your email address

We have sent a code to: **jack@hfp.co.uk**

The code will expire in 30 minutes.

! If you use a browser to access your email, you may need to open a new window or tab to see the code.

Confirmation code
For example, DNCLRK



[▶ I have not received the email](#)

Confirm

Email address confirmed

This will enable us to help you get the most from this service.

Continue

Enter your name and select continue:

What is your full name?

A green button with the text "Continue" in white, outlined in yellow.

Enter a new password and select continue:

Set up recovery for your sign in details

You need to set up a recovery word so that you can get back into Government Gateway if you forget your password.

Continue

Create a password

Your password needs to be 10 or more characters. To help you create a long and strong password, the National Cyber Security Centre recommends using three random words.

Select Continue:

You can use a mix of letters, numbers or symbols in these three words.

Password

Confirm your password



Continue

Set up a recovery word

Add your recovery word and press Continue:

! Make a note of this word in case you need it in the future.

The word must:

- ✓ be between 6 and 12 characters
- ✓ not contain spaces or special characters
- ✓ not contain numbers

Recovery word

testtest



Continue

Your Gateway User ID is:

Click Continue:

**Your Government
Gateway user ID is:**

86 89 45 78 89 56

We have sent it to **@hfp.co.uk**.

You will need your user ID and your password each time you sign in to Government Gateway.

Continue

Choose **Organisation** as the account type.

Choose the type of account you need



Individual

Includes personal tax account, tax credits, Self Assessment and Child Benefit



Organisation

Includes limited companies, partnerships, charities, trusts and estates



Agent

Includes accountants acting on behalf of clients, payroll bureau and bookkeepers

Continue

Set up additional security, press Continue:

You need to set up additional security

This is to make sure only you can sign in.

Choose your preference then select Continue:

Continue

How do you want to get access codes?



Text message

Get codes sent to a mobile phone.



Voice call

Get codes by automated message to a UK mobile or landline.



Authenticator app for smartphone or tablet

Get codes generated by an authenticator app on your mobile device such as a smartphone or tablet.

Continue

Choose yes to UK mobile number (if applicable)

Enter a UK mobile phone number

We will send an access code to this mobile phone by text message.

UK mobile phone number



[Choose a different way to get access codes](#)

Then enter your number and select Send Access Code:

Enter the code and select Continue:

Enter the access code

We have sent a 6 digit access code to +44

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



Problems with this code? [Try another option](#)

Continue

Confirmation:

You've set up additional security

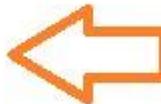
Every time you sign in we will request an access code.

If you've set up more than one security preference you'll be able to choose how you get the access code.

Continue

Select No and Save and Continue:

Has the trust already been registered online?

Yes No 

Save and continue

Select No if applicable and Save and Continue:

Does the trust have a Unique Taxpayer Reference (UTR)?

Yes No 

Save and continue

An express trust is a trust created deliberately by a settlor, usually in the form of a document such as a written deed of trust.

Select Yes and Save and Continue:

Are you registering an express trust?

An express trust is a trust created deliberately by a settlor, usually in the form of a document such as a written deed of trust. Express trusts can be created by will or during lifetime, also known as inter-vivos.

 Yes No



Select No if applicable, then Save and Continue.

Does the trust have any tax liability from 6 April 2021 to 5 April 2022?

Yes No 

Save and continue

Whether any tax has been paid is unique to each trust.

Has the trust had any UK tax liability in the last four tax years?

A trust has a tax liability if it either:

- needs to fill out a Self Assessment: Trust and Estate Tax Return (SA900)
- is liable for Capital Gains Tax
- is liable for Income Tax

Yes No 

Save and continue

You will need to Nominate a lead Trustee.

Before you continue

While all trustees are equally legally responsible for the trust, you need to nominate a 'lead' trustee.

The lead trustee will:

- receive the trust's Unique Reference Number (URN)
- receive all official documents for the trust
- be the main point of contact with HMRC for the trust

As the lead trustee is the main point of contact for the trust, you need to keep their contact information up to date.

You can find out more about:

- [Who should register \(opens in a new window or tab\)](#)
- [Trusts and taxes \(opens in a new window or tab\)](#)

Continue to Register the Trust:

[Continue to register the trust](#)

Fill in the details as shown starting with the Trust Name:

Registration progress

You can save your registration and come back later. You have 28 days from the first time you save to complete this registration or your information will be deleted.

Saved until

29 April 2022

Sections to be completed

Trust details 	NOT STARTED
Settlors	NOT STARTED
Trustees	NOT STARTED
Beneficiaries	NOT STARTED

Additional sections to be completed

Company ownership or controlling interest	NOT STARTED
Protectors	NOT STARTED
Other individuals	NOT STARTED

Enter the Trust Name:

What is the trust's name?



You have 53 characters remaining

Save and continue

To enter the Settlor's information, you will need the following:

Select Continue at the bottom of the page:

Questions are:

Was the trust set up after the settlor died?

Yes or No

Is the settlor an individual or a business?

Individual or Business

What is the settlor's name?

First, Middle and Last

Settlers that are an Individual

If the trust was created after the settlor died, tell us their name. If you know more details, tell us their:

- date of death
- date of birth
- country of nationality
- last known country of residence

If the trust was created by a living settlor, tell us their name. If you know more details, tell us their:

- date of birth
- country of nationality
- country of residence

You also need to tell us if any of the settlors lack mental capacity at time of registration.

Trustee's Details:

Questions are:

Are you entering details for the lead trustee or a trustee?

Lead Trustee or Trustee

Is the lead trustee an individual or a business?

Individual or business

What is the lead trustee's name?

First, Middle and Last

Enter Lead Trustee and then remaining Trustees details.

Lead trustee

You need to give us details of a lead trustee. This is the person or business we will contact if we need to discuss the trust and send all official documents to. The lead trustee is responsible for keeping the trust's details up to date on the register.

If the lead trustee is an individual, make sure you enter their name, date of birth and National Insurance number correctly, as these details need to match what we have on our records.

Trustees that are an Individual

If the lead trustee is an individual with a National Insurance number, tell us their:

- name
- date of birth
- country of nationality
- National Insurance number
- country of residence
- address
- email address
- phone number

If the lead trustee does not have a National Insurance number, you need to tell us their passport or ID card details and address.

For all other trustees that are individuals, tell us their names. If you know more details tell us their date of birth, country of residence and country of nationality.

Beneficiaries details needed are Date of birth, nationality and residence.

Select Continue at the bottom of the page and choose what kind of individual.

Fill in as many details as possible and save. This is needed for each beneficiary.

What kind of beneficiary do you need to add first?

You can enter a maximum of 25 entries for each beneficiary type.

- Individual
- Class of beneficiaries
- Charity or trust
- Company or employment related
- Other beneficiary

Save and continue

Beneficiaries that are an individual

For individuals named in the trust deed, tell us their name. If you know more details, tell us their:

- date of birth
- country of nationality
- country of residence

Beneficiaries that lack mental capacity

You need to tell us if any of the beneficiaries lack mental capacity at time of registration.

A beneficiary does not have mental capacity if they cannot understand information about the trust due to any of the following:

- mental illness
- learning disability
- dementia or a related condition
- being unable to communicate

If a beneficiary lacks mental capacity, you need to tell us if a vulnerable person election form (VPE1) has been submitted to HMRC.

Class of beneficiaries

You need to give a short description for individual beneficiaries that cannot be identified. For example, children not born yet, future grandchildren and great grandchildren.

Beneficiaries that are a charity or trust

Tell us their name. If you know more details, tell us their country of residence.

to

Additional sections to be completed if applicable.

Does the trust own or have a controlling interest in a non-EEA company?

Does the trust have a protector?

This is an individual or business named in the deed that can affect the way the trust is managed.

(This can normally be found in the trust deeds)

Are there any other individuals associated with the trust?

This can be anyone who can affect the way the trust is managed, but does not fit any of the specific trust roles, such as the parent of a young beneficiary.

Additional sections to be completed

[Company ownership or controlling interest](#)

IN PROGRESS

[Protectors](#)

IN PROGRESS

[Other individuals](#)

IN PROGRESS

Once all information has been submitted you need to 'sign' the declaration page.

Click Confirm and Send.

Declaration

Your first name

Your middle names (optional)

Your last name

I confirm that I have taken all reasonable steps to obtain up to date and accurate information for all of the entities given in this registration. I understand that if I knowingly provide false information and I cannot demonstrate that I have taken all reasonable steps, I could be subject to penalties.

Confirm and send

Confirmation Page

To get the Trusts URN you need to sign out of the service, then sign back in using the Government Gateway account used to register the trust.

Registration received

Your reference is:

1234567891011

[Print or save a declared copy of the trust's registration](#)

Keep a note of this reference in case you need to contact HMRC. This is a reference number for this declaration, and will not be used to identify the trust.

The reference number for the trust

The Unique Reference Number (URN) for the trust has been linked to this Government Gateway account.

The URN is a permanent reference number, and it's how HMRC will identify this trust.

- A URN has 15 letters and numbers, for example ABTRUST71234567

You can return to this service using the same Government Gateway account used to register the trust.

How to get the trust's URN



To view the trust's URN you need to sign out of the service, then sign back in using the Government Gateway account used to register the trust.