



Beneficiary Identification

100 point check

All Beneficiaries of Estates/Trusts administered by Tasmanian Perpetual Trustees Fund are required to provide identification totalling one hundred points as per the following scale:

Birth Certificate or Passport (only one may be used)	70 points	<input type="checkbox"/>
Drivers Licence	40 points	<input type="checkbox"/>
Land Titles Office Records	35 points	<input type="checkbox"/>
Accounts – Aurora, Telstra etc	25 points	<input type="checkbox"/>
Credit Card or Medicare	25 points	<input type="checkbox"/>
Marriage Certificate	25 points	<input type="checkbox"/>
Rates Notice	25 points	<input type="checkbox"/>
Telephone Book Listing	25 points	<input type="checkbox"/>

Office Use Only:

Copies of Identification documents to be attached and kept on estate file.

TACT Updated

Beneficiaries may wish to use the Form S.21 "Reference from an acceptable referee" rather than come into a Tasmanian Perpetual Trustees office to produce identification.

1. Estate/Trust Name

Estate/Trust Name

Trust Administrator

Account Number

2. Beneficiary Name

Title (Mr/Mrs/Ms/Other)

Surname

Given Names Date of Birth

3. Postal Address Details

C/- (If applicable)

Address

Suburb or Town

State Postcode

Home Phone

Work Ph

Email

Mobile

4. Applicant Signature

Date

DAY MONTH YEAR