



Using the Trust Registration Service (TRS):

How to claim a trust and authorise an agent

Claim a trust/authorising an agent.

The following instructions are for:

- Authorising your agent
- Claiming a trust

Please note: If an agent registered on your behalf, you will need to create a Government Gateway account.

1. Open a search engine, for example Google or similar
2. Type in 'claim a trust'
3. Click the search result, 'Manage your trust's details – GOV.UK'.
4. Please read the information on the page.
5. Towards the end of the page, you will see a green box that says 'start now'.
6. This will lead you to the Government Gateway login screen.
 - a. If you registered yourself you will already have this: **Skip to step 10**
 - b. if you have not already registered yourself please follow the next instructions
7. You will see under the 2 boxes 'create sign in details' – please click this. This needs to be a **new Government Gateway not connected with anything else you use GOV.UK for**, i.e. PAYE. (Note: You will need a new Government Gateway for each trust)
8. Follow the instructions, using an email address and password to set up the account, remembering to keep a note of the email and password used, and keep pressing continue after each step.
9. You will be asked what account type you want: Ensure you click the option 'organisation'
10. You will now be prompted to answer some questions about the trust. This will usually be:
 - a. Lead Trustee details
 - b. Name
 - c. Date Of Birth (DOB)
 - d. National Insurance number (NI or NINO)
11. For details of a person associated with the trust you can use another trustee, a beneficiary, or a settlor if they were on the register. If the lead trustee is an organisation you will also be asked for postcode and start date associated with the trust.
12. Check your answers and continue
13. You should then see the message "You have successfully claimed the trust".



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14. Note: If one of the answers you gave is not correct, the response will say 'Details do not match' and you will have 2 more attempts before being locked out for 30 mins. The answers must match **exactly** what was provided when the trust was registered or last updated (including spaces between and after words).
15. If you are authorising an agent at this point let them know you have successfully claimed the trust. The agent will then get a link from their Agent Services Account which they will need to send you in an email. When you open this link, sign in using your Government Gateway created earlier (it might log you in automatically)
16. Follow the on screen instructions to authorise your agent to allow them to manage the trust.

If your trust is taxable and you don't want to authorise an agent, you need to sign in to 'manage my trust details' annually to complete a declaration confirming everything on the register is up to date. This is also where you can update most details regarding the trust.