

# Personal Injury Trust Application Form

## Your details (Please complete the form in block capitals)

Title Mr  Mrs  Miss  Ms  Other \_\_\_\_\_  
Postcode .....  
First name .....  
National insurance no. ....  
Middle name (s) .....  
Contact tel. no. ....  
Surname .....  
Date of birth .....  
Address .....  
Nationality .....  
.....  
Email .....

## Your trustees' details

### Trustee 1

Title Mr  Mrs  Miss  Ms  Other \_\_\_\_\_  
First name .....  
Middle name (s) .....  
Surname .....  
Address .....  
.....  
Postcode .....  
Date of birth .....  
Nationality .....  
Contact tel. no. ....  
Email .....

### Trustee 2

Title Mr  Mrs  Miss  Ms  Other \_\_\_\_\_  
First name .....  
Middle name (s) .....  
Surname .....  
Address .....  
.....  
Postcode .....  
Date of birth .....  
Nationality .....  
Contact tel. no. ....  
Email .....

## Correspondence address/principal contact (All correspondence, including bank statements and cheque books)

Title Mr  Mrs  Miss  Ms  Other \_\_\_\_\_  
Address .....  
First name .....  
Middle name (s) .....  
Postcode .....  
Surname .....

## Welfare benefit review

As part of our Personal Injury Trust service, we offer a comprehensive review of your benefits to ensure you are getting the correct entitlement and identify any additional benefits you may be eligible for. Please choose from the following options:

- I would like the Personal Injury Trust and welfare benefits review at £650 + VAT (please note that you may receive two separate invoices for these services depending on the timing of the services).
- I do not want the welfare benefits review but simply require the Personal Injury Trust for £500 + VAT.

## Fees

On preparation of the trust deed, an invoice will be produced and the fee will become payable whether or not you choose to proceed.

- I would like the invoice to be addressed to my solicitor and the fee for the service to be paid from my award monies.
- I would like the invoice to be addressed to the principal contact named above and the fee will be paid once the award monies are sent to the trust bank account.



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## Data protection

Nestor is committed to safeguarding your personal data. Our privacy notice summarises how we collect, store and handle your personal data and can be found at [www.nestor.co.uk/privacy-notice](http://www.nestor.co.uk/privacy-notice). A hard copy is available on request.

## Anti-money laundering

Where we are required to verify your identity in accordance with the Criminal Justice Act 1993 and Money Laundering Regulations we will use a third party, Experian, to conduct electronic identity checks. In most cases this removes the need to provide us with personal documentation, although in some cases additional documents may be required. The checks are completed using your name, address and date of birth. When a search is made:

- Experian may check the details that you provide, against any particulars on any database (public or otherwise) to which Experian has access in order to carry out the relevant verification service.
- A specific (non-credit) footprint is left by Experian, and Nestor will receive a record of the decision made for auditory purposes.

Further details of Experian's operations in the identity and fraud space can be found at <http://www.experian.co.uk/crain/idf-information-notice.html>. Nestor will not conduct checks more than once every 12 months unless specifically obliged to do so during our advice or ongoing service process by a third party product provider.

## Next steps

- Nestor will contact your solicitor to get the details of your personal injury claim to prepare the trust deed.
- You will then receive the trust document and trustee bank account application which needs to be signed by you and your trustees.
- The Nestor team are experts in advising recipients of personal injury awards. We can offer you Independent Financial Advice for your future financial planning.

## Signature and declaration

- I agree to Nestor preparing a Personal Injury Trust Deed and conducting a welfare benefits review, if selected. Nestor will facilitate the opening of a trust bank account, if required, at no extra cost.
- I acknowledge that the Nestor fee will become payable on preparation of the trust deed.
- I agree to pay the Nestor fee as stated above.
- I agree to Nestor contacting my benefits office notifying them of the creation of the Personal Injury Trust.
- I agree to my details being passed to Experian for the purposes of an electronic identity check.

Signature .....

Date .....

### Trustee 1

- I agree to my details being passed to Experian for the purposes of an electronic identity check.

Signature .....

Print name .....

Date .....

### Trustee 2

- I agree to my details being passed to Experian for the purposes of an electronic identity check.

Signature .....

Print name .....

Date .....

