



QB Partners/ZEDRA TRS Service – Adviser firm expression of interest

This ‘expression of interest’ document is intended as a non-binding agreement, which helps both parties to formulate a plan and ensure suitable resources are put in place.

- We [IFA Firm name], will require support for an internal TRS roll-out to ensure all staff are familiar with which trusts need to register, the difficulties facing “lay trustees”, the type of data which needs to be supplied, and how the QB Partners/ZEDRA Trustee Registration Service works.
- We will consider integrating draft paragraphs supplied by QB Partners for contacting our lay trustee clients to help them consider the practical difficulties they face registering trusts and why this TRS service offering is attractive.
- We have reviewed/are reviewing back-office systems and paper/electronic files to identify trustee clients and have tested/are testing this with sample advisers.
- Based on preliminary results we believe the firm has [_] number of trusts that will need to register
- Based on initial findings, we anticipate a take up rate of [_] %
- We intend to either complete this exercise by [__date__] or complete over [__] months, by rolling out the service to coincide with trustee client annual reviews.
- We are willing to introduce QB Partners (in respect of this service) to additional adviser firms and/or groups of advisers (detail in the comments box below)
- We have asked for and received due diligence on QB Partners/ZEDRA and are happy to progress. (NB: If this part of the process is not yet complete, please request information in the comments box below).
- We are keen to use the data captured though the TRS process and will work with QB Partners – who can supply model trustee meeting notes, letters of wishes, record of gifts forms – to assist trustee clients put in place better and more robust trust management procedures.

Notes/comments

Name of adviser firm & decision maker for TRS