

# Beneficiary Identification 100 Point Check



All Beneficiaries of Estates/Trusts administered by Tasmanian Perpetual trustees Fund are required to provide identification totalling one hundred point. 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.

## Estate/Trust name

Estate/Trust Name									
Trust Administrator									
Account Number									

## Beneficiary name

Surname								Mr/Mrs/Ms/Other			
Given Names											
Phone (Home)					Phone (Business)						
Phone (Mobile)					Fax						
Email											
Occupation					<input type="checkbox"/> Full Time		<input type="checkbox"/> Part Time		<input type="checkbox"/> Casual	<input type="checkbox"/> Self Employed	
Marital Status					Date of Birth		/ /		Place of Birth		

## Postal address

C/- (If applicable)									
Address									
							State		Postcode

## Residential address

C/- (If applicable)									
Address									
							State		Postcode

## Applicant Signature

	Date	/	/
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### OFFICE USE ONLY

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

TACT Updated

- |  |                          |             |
|--|--------------------------|-------------|
| Birth Certificate or Passport (only one may be used) | <input type="checkbox"/> | (70 points) |
| Driver's Licence                                     | <input type="checkbox"/> | (40 points) |
| Land Titles Office Records                           | <input type="checkbox"/> | (35 points) |
| Accounts e.g. Aurora, Telstra                        | <input type="checkbox"/> | (25 points) |
| Credit Card or Medicare Card                         | <input type="checkbox"/> | (25 points) |
| Marriage Certificate                                 | <input type="checkbox"/> | (25 points) |
| Rates Notice   | <input type="checkbox"/> | (25 points) |
| Telephone Book Listing                               | <input type="checkbox"/> | (25 points) |

Identification checked by	_____
TPTL Branch	_____
Date	___/___/___
TPTL staff signature	_____

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