In order to ensure this process goes as fast as possible, we will require some additional information with your application.

Initial costs for this are £300+vat.

We will require the following to refer their request to M&R for approval:

- 2 certified AML evidence for each client and a letter from yourself on headed paper advising that you have verified your clients' identity.
- Attached Appointment request form to be completed and signed by clients
- Letter from your clients advising why they want to use a professional trustee
- Full financial info for all settlors (usually completed on app form)