

Transact Discounted Gift Trust: Application Process

The following process outlines the necessary steps for setting up a Transact Discounted Gift Trust ('DGT') for your client. This document should be used in conjunction with the DGT Coversheet, and the Guidance Notes for both the Transact Discounted Gift Bare Trust and the Transact Discounted Gift Discretionary Trust (hereinafter referred to as 'DGT Guidance Notes'). These are available on Transact Online under *Information* → *Trust Documents*.

Identify the suitability of a DGT for your client. Download the DGT Coversheet and the DGT Guidance Notes from Transact Online. These documents will help you determine whether a DGT is suitable for your client, and will also guide you through the full process of opening a DGT with Transact.

