Trustees - AU

The **Trustees** tab displays current and former trustees for the trust.

There can be multiple trustees of a trust made up of individual people or a company (corporate trustee). The trustee's role is to hold the trust property for the benefit of the beneficiaries.

A trustee can also be a beneficiary, but they can't be the only beneficiary unless there are multiple trustees.

To add a trustee

1. Select a client on **My List** and click **Corporate admin**.
2. Click the **Trustees** tab.
3. Under **Trustees**, click **Add trustee**. The **Search for trustee** field appears.
4. Enter the name of a contact to add as a trustee

   or

   Click **Create new contact** and fill in the details.

To edit a trustee

1. Select a client from **My List** and click **Corporate Admin**.
2. Click the **Beneficiaries** tab.
3. Click the  icon for the beneficiary and choose **Edit beneficiary**.

To remove a trustee

1. Select a client from **My List** and click **Corporate Admin**.
2. Click the **Beneficiaries** tab.
3. Click the  icon for the beneficiary and choose **Delete beneficiary**.

Trustee register

The **Trustee register** lists all current and former trustees and details, including:

- the **Start date**, when the trustee was first appointed
- the **End date**, where the trustee ceased being a trustee
- the **Type** of trustee — corporate or individual
- the **Address** of the trustee.

To maintain an accurate history of trustees, you can add the details of former trustees as a historical entry.

To add a historical entry to the Trustee register

1. Click **Add historical entry** located at the end of the **Trustee register**. The **Search for trustee** field appears.
2. Enter the name of the trustee and click on their name to add

   or

   Click **Create new contact**, fill in their details and click **Add trustee**.