



Swiss Association
of Trust Companies

Application for Professional Affiliate Status

for the

Swiss Association of Trust Companies

("SATC")

Professional Affiliate Applicant:

Title: _____

Family Name / First Name(s): _____

Address (business or private): _____

Profession / Employer: _____

Telephone (fixed): _____

Telephone (mobile) _____

E-mail: _____

Date of Submission: _____

SATC

Postfach 616

Neugasse 12

6301 Zug

Phone: +41 (0)41 727 05 25

Introduction:

SATC Professional Affiliate Status is open to professionals who are working in or have a relationship with the trust industry in Switzerland. These professionals should support the objectives, rules and values of SATC and may associate themselves to SATC as Professional Affiliates. For the avoidance of any doubt, such individuals are not members of SATC and have no voting rights, but they may join technical committees and benefit from all the advantages not specifically linked to membership, such as attend meetings and SATC events at preferred conditions. An annual contribution is levied by the SATC in such amount as it may determine (currently CHF 500). Such membership fee may be waived for professional affiliates that give an active contribution to SATC, e.g. within the Technical Working Groups. For more details please contact the SATC Secretariat or view the SATC website, www.satc.ch.

Please note that the SATC Committee will only consider applications which are fully completed with all the necessary attachments enclosed. The Applicant may be contacted by the Secretariat or a Committee Member in order to obtain additional information. All information contained in this form will be kept strictly confidential by the SATC Committee and persons to whom they may delegate administrative tasks. In case of a negative decision, the application documentation will, in general, not be returned to the Applicant.

The Annual Fee of currently CHF 500 is due following acceptance of the Application and payable to SATC as follows:

Bank: Credit Suisse, 8070 Zurich
Sort Code/BIC: CRESCHZZ80A
Name of account: Swiss Association of Trust Companies
Account number: 0879-594550-31
IBAN: CH35 0483 5059 4550 3100 0

Section 1: Details on Applicant

Please detail the Applicant's relationship with the Trust industry in Switzerland:

Kindly provide details of areas where the Applicant can bring specific knowledge or support to SATC (e.g. regulatory, legal, tax, technical on succession planning issues etc.):

Kindly Indicate whether you are a STEP member:

STEP Branch: _____

STEP Membership number: _____

Member of STEP since: _____

Section 2: Additional Information

Please provide the following copies in respect of the Applicant:

- Copy of passport or identity document
- Curriculum Vitae

The CV should provide full details of the Applicant's trust and/or estates or financial regulation experience

Section 3: Data

Information provided in, with and related to this Application is strictly confidential and will be treated as such by the organs and persons of the Association dealing with the Application. The information provided in the Application may be further used for statistical purposes and the Applicant hereby agrees to such use. The Association will take all appropriate measures to ensure that the specific identity of the Applicant and information related thereto retains its strictly confidential nature.

The individual applies for Professional Affiliate Status of the Swiss Association of Trust Companies (SATC) and agrees to support the objectives, rules and values of SATC. The Applicant confirms that all information provided in the Application is true to the best of its knowledge and belief.

Place and Date: _____

Signed: _____

Name: _____

Position: _____

When completed kindly send the application form and all attachments to the SATC Secretariat, P.O. Box 616, Neugasse 12, 6301 Zug.
