

# DISCRETIONARY TRUST TAX RETURN



To be delivered by disponent under Section 46 (15) of the Capital Acquisitions Tax (CAT) Act, 2003,  
in respect of property becoming subject to a Discretionary Trust on or after 11 February, 1999

The Revenue Commissioners collect taxes and duties and implement customs controls. Revenue requires customers to provide certain personal data for these purposes and certain other statutory functions as assigned by the Oireachtas. Your personal data may be exchanged with other Government Departments and agencies in certain circumstances where this is provided for by law. Revenue's data protection policy and information on your data protection rights are available on [www.revenue.ie](http://www.revenue.ie).

## A. THE DISPONER

PPSN

Name

Address  
(Include Eircode)

Domicile

## B. RELEVANT DETAILS

Date of principal instrument relating to the trust  /  /  Trust PPS Number   
(a copy to be attached if none has already been forwarded)

Date of disposition  /  /   
(Where property has become subject to the Trust on different dates on or after 11 February, 1999 please complete a separate return in respect of each disposition)

## C. OBJECTS OF THE TRUST

List here the names and addresses of the living objects of the Trust

## D. TRUSTEES

List here the names and addresses of the present Trustees of the Trust

## E. PROPERTY BECOMING SUBJECT TO THE DISCRETIONARY TRUST

List here property becoming subject to the discretionary trust at the date of the disposition referred at B above

Estimated Market Value at  
date of Disposition

€

## F. DECLARATION

I/We declare that to the best of my knowledge, information and belief, the information given in this form is correct and complete.

Signed  Date  /  /

Name and address of the person to whom  
correspondence should be addressed

Further assistance in completing the  
return can be obtained by contacting

The Revenue Commissioners  
Capital Acquisitions Tax Unit  
Block F, Athy Business Campus  
Castlecomer Road  
Athy, Co. Kildare, R14 FE81  
+353 1 738 3630

Agent's Ref. No. \_\_\_\_\_

Agent's Code \_\_\_\_\_

Revenue



Cáin agus Custaim na hÉireann  
Irish Tax and Customs