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HOW TO: REGISTER A BARE TRUST POLICY WITH REVENUE'S CENTRAL REGISTER OF BENEFICIAL OWNERSHIP OF TRUSTS (CRBOT)



- Log in to MyAccount.ie
- Scroll down to the section **‘Manage My Record’** box.
- Select **‘Trust Register Functions’**
- Click Start
- You will then be guided through each screen

Manage My Record



Manage My Record: a range of services to manage and update your record and make enquiries.

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- You will be brought to a new screen
- Click 'Register a new Trust in the Trust Register'

Trust Register Functions

This service allows you to register a new Trust into the Trust Register.

[Register a new Trust in the Trust Register](#)

You can also view and update the details of any trust that you have filed previously. Below is a list of trusts you previously filed.

Show entries

Trust Name and Registration Number
No data available in table

Showing 0 to 0 of 0 entries

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- You will then be prompted to enter the details of the Trust account, as provided by Oakwood Financial Advisors

- The initial question refers to the Presenter – you will need to select ‘Trustee’ from the drop down menu:

Presenter

Presenter Capacity

Capacity of the person providing the information

Trustee

- You will then be required to select the Trust Type – you will need to select ‘Estate Planning & Personal Wealth’:

Register a new Trust Register

Trust Type

Estate Planning & Persc

Name of Trust

Next →

- On the next screen, you need to select 'Beneficiary' as the Beneficial Owner:
- You will then need to complete the details of the beneficiary of the policy.
- Enter the start date (Oakwood can provide).
- Enter the 'Nature of Interest' as 'Beneficiary'.
- Please then click 'Save'.
- The beneficiary will then appear in the table below - you will need to click 'Confirm' :

Beneficial Owners

Beneficial Owner Details

Type of Beneficial Owner

Beneficiary

Is this Beneficial Owner a Legal Entity?

Yes

No

Beneficial Ownership List

Identifier	Type of Beneficial Owner	Name	Action	Action
	Beneficiary	John Doe	Remove	Amend

Confirm →

- To enter the details to the Trust Register, you will be prompted to enter your myAccount password to proceed:

Submit Changes

Please enter your myAccount password in order to submit your changes

Password

Submit

[Cancel](#)

- On the top left of the screen, click ‘Back to Tax Services’.
- Scroll down, and select ‘**Trust Register Functions**’
- Click the name of the beneficiary to expand the view.
- On the next screen, enter your details as ‘Presenter’.
- Click Next.

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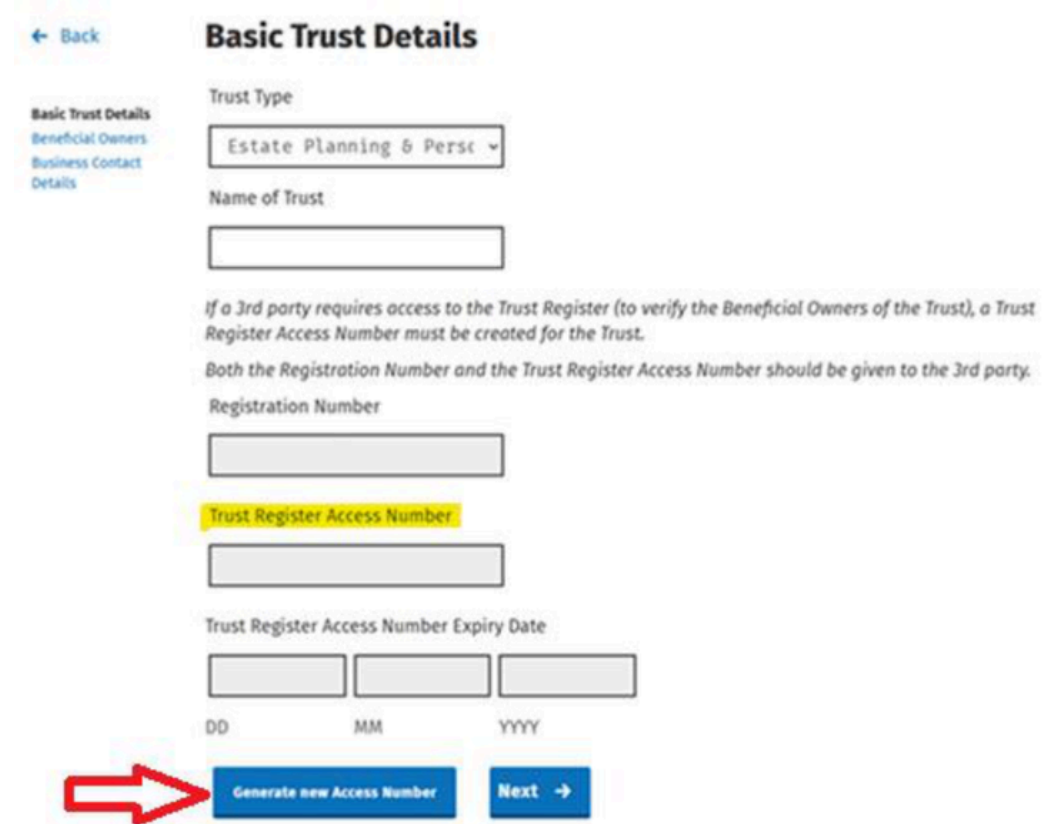
[Update Civil Status](#)

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- On the next screen, click ‘Generate New Access Number’.
- A ‘Trust Register Access Number’ will then appear – **take note of this number and let us know, as it is required by the Bare Trust provider.**
- Click Next.
- Click Save.
- Enter your Revenue password to finalise.



← Back

Basic Trust Details

Trust Type
Estate Planning & Persc ▾

Basic Trust Details
Beneficial Owners
Business Contact
Details

Name of Trust


*If a 3rd party requires access to the Trust Register (to verify the Beneficial Owners of the Trust), a Trust Register Access Number must be created for the Trust.
Both the Registration Number and the Trust Register Access Number should be given to the 3rd party.*

Registration Number

Trust Register Access Number

Trust Register Access Number Expiry Date

DD MM YYYY

 [Generate new Access Number](#) [Next →](#)