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

GOTO FINANCE LTD

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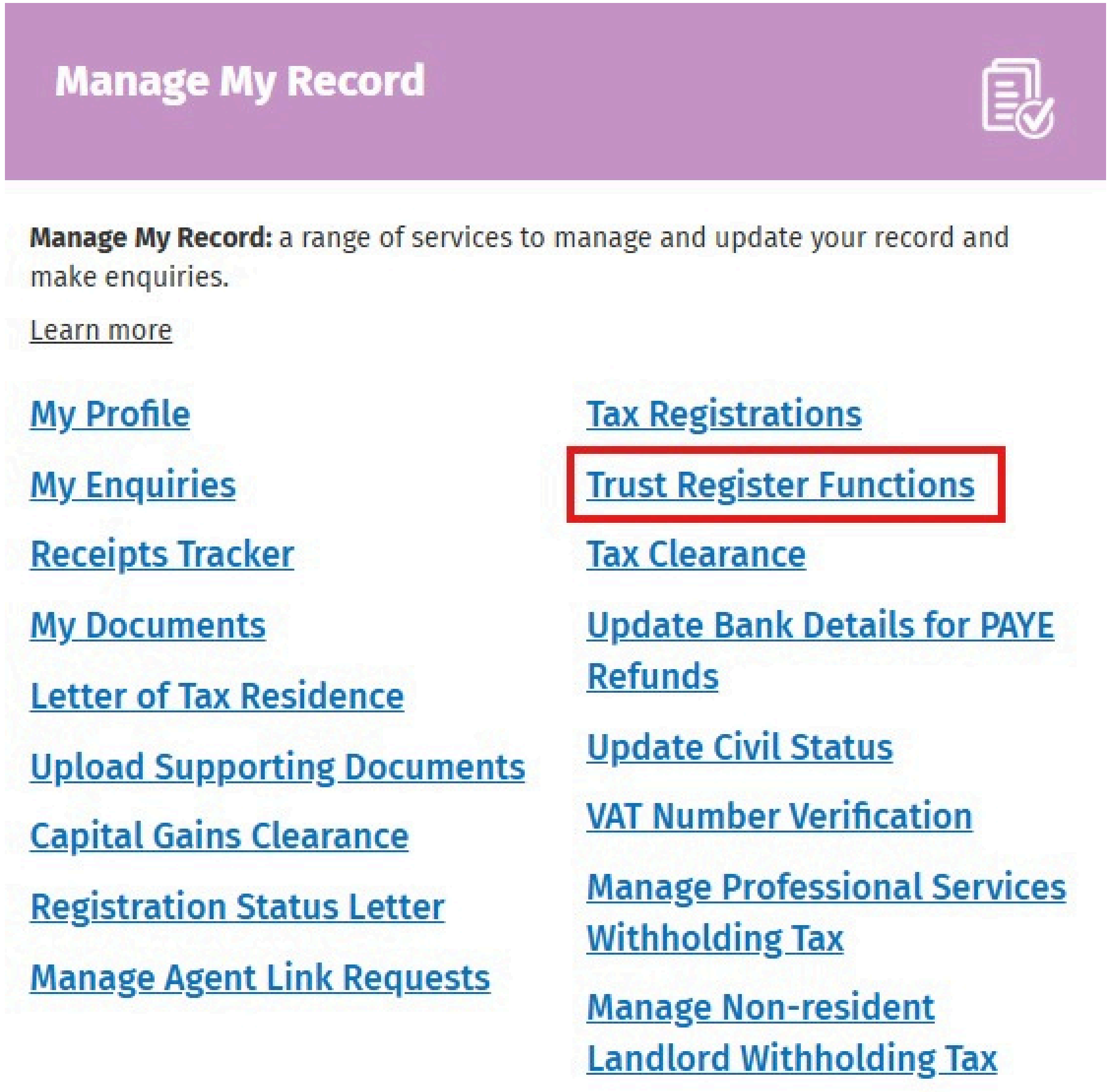
Church Street, Roscommon F42 XT20
t: 090 66 27878 e: Admin@gotofinance.ie

MyAccount.ie Walkthrough

- 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



MyAccount.ie Walkthrough

- 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 5 entries

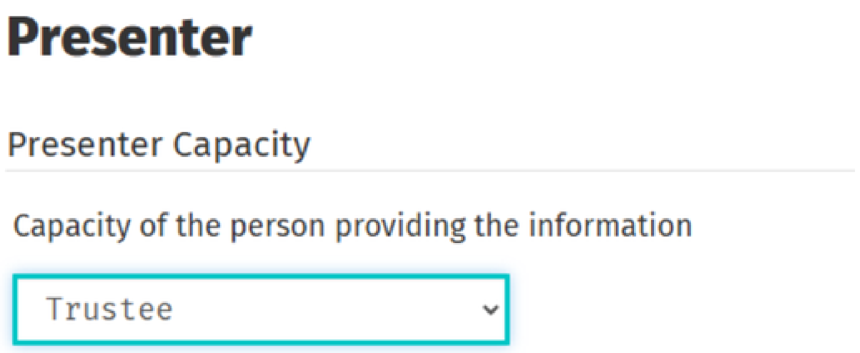
Trust Name and Registration Number
No data available in table

Showing 0 to 0 of 0 entries First Previous Next Last

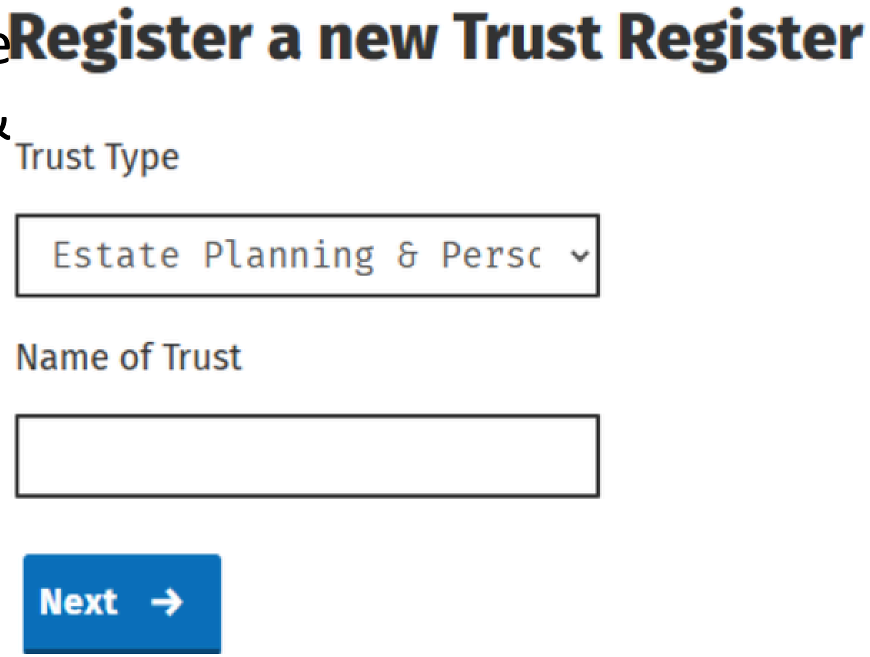
- You will then be prompted to enter the details of the Trust account, as provided by Oakwood Financial Advisors

MyAccount.ie Walkthrough

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

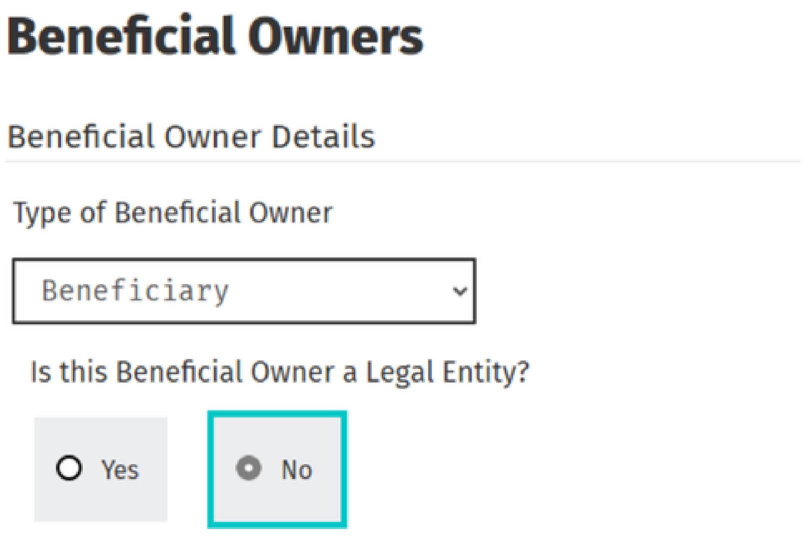


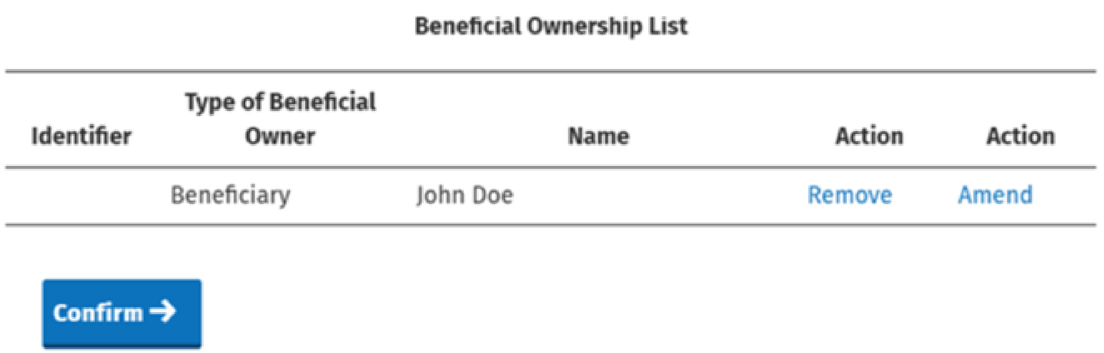
- You will then be required to select the Trust Type – you will need to select ‘Estate Planning & Personal Wealth’:



MyAccount.ie Walkthrough

- 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’ :





- 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

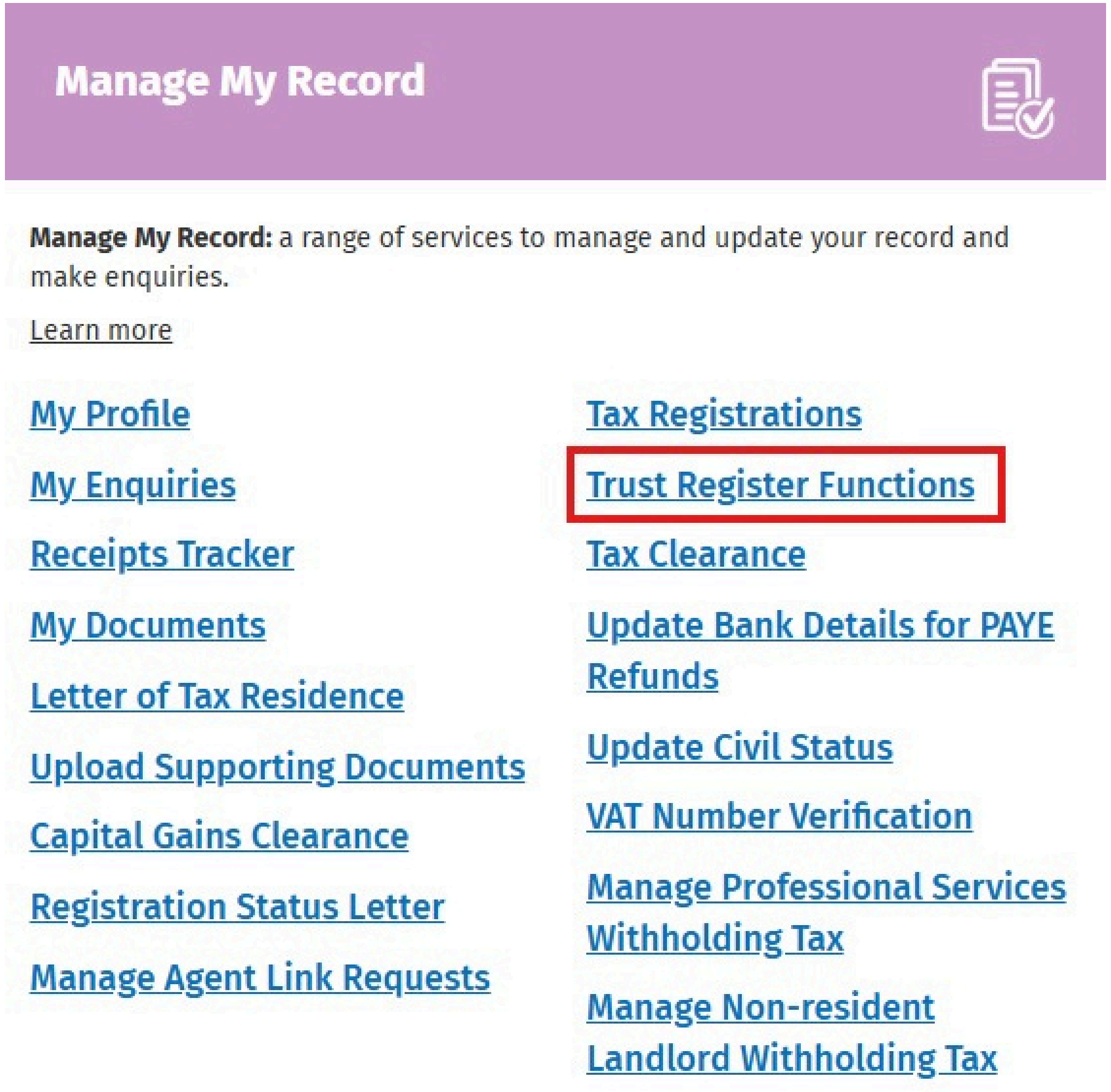
Password

Submit

Cancel

MyAccount.ie Walkthrough

- 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.



MyAccount.ie Walkthrough

- 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.