

Trust Name: \_\_\_\_\_

*Some of the following information sought may not be applicable to your trust, and some information sought may have already been provided. Please provide details where appropriate.*

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I have provided documents of:

- Any Trust minutes prepared during the year
  - Any gifting made to the trust
  - Any Deeds of acknowledgement of Debt or Forgiveness of Debt
  - Bank Interest certificates
  - Dividend certificates
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**Any changes to Trustees during the year? Include details below including date of the change:**


**Any changes to Beneficiaries during the year? Include details below including date of the change:**


**Was there any taxable income distributed to any beneficiary that we do not complete an Income Tax Return for? Include details:**
