

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.

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
- Copy of Trust Deed

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:

TRUST QUESTIONNAIRE | 2024

Please Provide details of Settlers & Beneficiaries below:

Trust Settlers: Full Name	Date of Birth	IRD Number

Trust Beneficiaries: Full Name	Date of Birth	IRD Number