

Trust name: Phone	
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I authorise you to prepare my tax return from the information and records I have supplied to you. I accept responsibility for the accuracy and completeness of all records and information supplied to you. You are authorised to communicate with my/our bankers, solicitors, finance companies, and any other business that I/We deal with to obtain such information as you require in order to complete the above duties.

Signature......Date.....

Recent legislation changes require us to provide more information to the IRD and complete Financial Statements when we may not previously have needed to do these.

Information required:

1. <u>Settlements</u>

Were any gifts made to/from the trust during the year? If yes, please provide details of the nature and amount of the settlements

2. Lawyers details

Who is the Trust's lawyer?	
With which Legal Firm?	

3. Legal Deeds

Were there any legal deeds signed that we should have a copy of e.g. minutes, deed of acknowledgment of debt, deed of forgiveness of debt

Yes No

If yes please provide copies

4. <u>Settlors</u>

Who is the settlor of the trust (who has made gifts to the trust)?

Name	DOB	Address	IRD Number
			РТО

Yes No

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5. <u>Distributions</u>

	Were any distributions made during the year, for ex	ample loans or gifts?		Yes No		
	If yes, please provide details for each beneficiary					
а	Name		DOB			
	Amount \$	Type of distribution:	Loan	Gift		
	If non-NZ resident, please advise country					
b	Name		DOB			
	Amount \$	Type of distribution :	Loan	Gift		
	If non-NZ resident, please advise country					
С	Name		DOB			
	Amount \$	Type of distribution :	Loan	Gift		
	If non-NZ resident, please advise country					

6. <u>Powers</u>

Who holds the power to appoint or remove trustees and beneficiaries or amend the trust deed?

7. Land settlements

Did the trust sell or buy any property during the year? If yes, please provide settlement statements

8. Crypto assets e.g. bitcoin

Have you received or traded in crypto assets during the income year?

If yes, please provide:

- The type of crypto asset
- For each transaction provide the date, type of transaction i.e. received or disposed of, number of units, value in NZD.

Crypto assets continued

- Total units of each crypto asset held at the beginning and end of the year
- Exchange records and bank statements
- Wallet addresses

Thank you for completing this questionnaire. Please don't forget to sign the other side. Yes No