

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

A6

### 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