

Trust Annual Questionnaire - 2025

Trust name: _____

Phone: _____

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 bankers, solicitors, finance companies, and any other business that deal with to obtain such information as you require to complete the above duties.

Signature _____

Date _____

Would you prefer your accounts to be sent to you: By e-mail By post I'll collect

Information required to complete your tax return:

1 Settlements

Yes No

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 Lawyer's details

Yes No

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

3 Legal Deeds

Yes No

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.
If yes, please provide copies

4 Settlers

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

Name	DOB	Address	IRD number

P.T.O.

5 Distributions

Yes	No
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Were any distributions made during the year, for example loans or gifts? For example, has your lawyer asked you to sign any paperwork in the last year to give money to beneficiaries.
If yes, please provide details for each beneficiary

a	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				

c	Name	DOB		
	Amount \$	Type of Distribution:	Loan	Gift
If non-NZ resident, please advise country				

d	Name	DOB		
	Amount \$	Type of Distribution:	Loan	Gift
If non-NZ resident, please advise country				

6 Powers

Yes	No
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Who holds the power to appoint or remove trustees and beneficiaries or amend the trust deed?

7 Land settlements

Yes	No
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Did the trust sell or buy any property during the year?
If yes, please provide settlement statements

8 Crypto assets e.g. bitcoin

Yes	No
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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
- 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.**