ECOVIS KGA LIMITED
2020 Trust Administration Questionnaire

We will contact you shortly to discuss your trust and a review, given the requirements of the new Trusts Act that will come into force in January 2021.

Please ensure this questionnaire is completed and included with your records that are sent to us.

Please complete a separate questionnaire for each trust.

Client Name	
IRD Number	

Trust Administration		
Please ensure that you provide supporting documentation for all transactions noted below	Yes	No
Have there been any capital distributions to beneficiaries during the year?	☐	☐
Have there been any income distributions to beneficiaries during the year?	☐	☐
Have there been any changes in Beneficiaries during the year?	☐	☐
Have there been any variations to the Trust Deed during the year?	☐	☐
Have there been any changes to policies for the management and administration of the trust?	☐	☐
Have any assets or investments been purchased by the trust during the year?	☐	☐
Have any other assets or investments been sold by the trust during the year?	☐	☐
Have any advances or loans been made to or from the trust during the year?	☐	☐
Have any major trust transactions / events occurred during the year?	☐	☐

If you have answered yes to any of the above questions, please provide copies of trustees minutes or details below:

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