

# ECOVIS KGA LIMITED

## 2021 Trust Administration Questionnaire

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**We will contact you shortly to discuss your trust and a review, given the requirements of the new Trusts Act that came 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?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any income distributions to beneficiaries during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any changes in Beneficiaries during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any variations to the Trust Deed during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any changes to policies for the management and administration of the trust?	<input type="checkbox"/>	<input type="checkbox"/>
Have any major trust transactions / events occurred during the year? (sale / purchase of assets, advance made or received).	<input type="checkbox"/>	<input type="checkbox"/>
<p>If you have answered yes to any of the above questions, please provide copies of trustees minutes or details below:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		