

ECOVIS KGA LIMITED

2022 Additional Trust Information

Additional Trust information

From the 2022 tax year onwards, the IRD requires more information on New Zealand trusts.

Did the trust earn income during the year?

Yes	No
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If yes,

1. Complete the Trust questionnaire for financial information
2. Provide the additional information below

A. Settlers and Settlements:

Settlements and settlers for tax purposes:

- A person that has transferred value to the trust does not need to be named in the trust deed but will be deemed to be a settlor if they transfer value.
- Settlements include the transfer of cash, financial arrangements, land and buildings, shares, and services at less than market value (excluding incidental services)

B. Beneficiaries:

Current beneficiaries of the trust

C. Persons with Power of appointment

Any person who has the power to appoint or dismiss a trustee, add or remove a beneficiary or amend the trust deed

Please complete a separate sheet for each person

Settlor/Beneficiary/Power of appointment (tick the appropriate box)	Settlor	Beneficiary	Power of appointment
Full name			
Date of birth			
If not an individual – date of commencement			
Jurisdiction of tax residency			
IRD number (if NZ tax resident)			
TIN (if not NZ tax resident)			
Settlors only:			
Has anybody made a settlement on the trust?			
If yes, provide details of settlement:			
Beneficiaries only:			
Is the beneficiary using a trust asset for less than market value?			
If yes, please provide details of the asset and usage			
<i>Additional financial information required which we will extract from the financial statements</i>	<ul style="list-style-type: none"> • <i>Opening Balance of beneficiary loan</i> • <i>Movements on beneficiary loans - distributions, income and/or capital, forgiveness of debt</i> • <i>Drawings</i> • <i>Closing Balance</i> 		