ECOVIS KGA LIMITED

2022 Trust Administration Questionnaire

Please be aware of the requirements of the new Trusts Act that came into force in January 2021 and contact us if you wish to discuss.

You also need to complete the "Additional Trust Information Questionnaire" for the 2022 year onwards

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 major trust transactions / events occurred during the year? (sale / purchase of assets, advance made or received).	☐	☐

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