



2025 TRUST QUESTIONNAIRE

NAME:

Circle Answer

1 BANK STATEMENTS – ALL TRUST bank accounts – we don't need personal

For all accounts for the full year from 1 April 2024 to 31 March 2025

Supply - TRUST Main bank Account

- Trust Savings Account

Yes No N/A

Yes No N/A

2 ASSETS PURCHASED/SOLD – OR OTHER ASSETS TRANSFERRED TO TRUST Yes No N/A

If there have been any assets sold or purchased during the financial year, please provide details and invoices (receipts) – remember to include motor vehicles here

Assets are those items with a life of more than 1 year that cost more than \$1,000

Assets Purchased – including properties

Description	Date	\$	Invoice Attached
			Tick <input type="checkbox"/>
			Tick <input type="checkbox"/>
			Tick <input type="checkbox"/>

If a new property is purchased we will need Sale & Purchase Agreement

Yes No N/A

Plus ALL Solicitor Settlement Statements, Loan Agreements & Statements

Assets Sold or Scrapped

Description	Date	Sold/ Scrap	\$

3 LOAN STATEMENTS – full year for all loans

Provide copies of Loan statements showing interest and principal paid for the year.

Yes No N/A

4 NEW MORTGAGE / LOAN DETAILS

Attach a copy of any other NEW Mortgage / Loan / HP agreements

Yes No N/A

5 LEGAL EXPENSES

Attach copies of invoices for all legal fees in the last financial year

Yes No N/A

6 GIFTING FOR TRUST

Was any gifting done for your trust between 1 April 2024 & 31 March 2025?

Yes No N/A

7 INTEREST RECEIVED – Bank, PIE & KiwiSaver

Attach Interest certificates & RWT Certificates – while we get some details from IRD we need to check

Yes No N/A

8 DIVIDENDS RECEIVED

Attach Dividend certificates or obtain report from Link or Computershare

Yes No N/A

9 BENEFICIARY / TRUSTEE INFORMATION

Yes No N/A

List all Beneficiaries and Trustees, including corporate trustees

Full Legal Name	Are they a Trustee or Beneficiary or both?	IRD number	Date of Birth

Phone: (09) 296 0629 • Email: evelyn@oldbooks.co.nz

Address: 13 King Street, Papakura 2110 • Website: www.evelynmae.co.nz

10 RENTAL PROPERTIES? Yes No N/A
Do you have a Rental property - If YES, then please complete a **RENTAL** Questionnaire as well

11 BUSINESS? Yes No N/A
Do you have a Business - If YES, then please complete a **BUSINESS** Questionnaire too

12 CORRESPONDENCE & NEWSLETTERS Via Email or NZ Post

13 CONTACT DETAILS - PLEASE complete email / phone even if you think there are no changes

Postal Address: **Work Phone:**

..... **Home Phone:**

..... **Fax Number:**

Physical Address:

..... **Cellphone:**

..... **Email:**

14 OTHER INFORMATION AND INTENTIONS Yes No N/A
What plans do you have that might be relevant to your tax situation?
E.g. sale/purchase rental or business, moving into import/export, expected large increase/decrease in sales, re-locating overseas, opening an overseas branch etc. Details below:

.....
.....
.....
.....
.....

15 BANK ACCOUNT FOR IRD REFUNDS – Name of Account, plus Account number

.....
Name on Bank Account eg Jo Bloggs

.....
Bank account number in full

16 I CERTIFY THAT the information provided in this document is true and correct to the best of my knowledge; and that I have provided all the relevant documentation and data needed.
Further Evelyn Mae Ltd has authority to act on our behalf with IRD for ALL tax types:

.....
Signature Date

Name in Full:

IRD Number:

**REMEMBER IF THE TRUST OWNS A RENTAL PROPERTY OR BUSINESS, WE
NEED ANOTHER QUESTIONNAIRE COMPLETED WITH THOSE DETAILS**