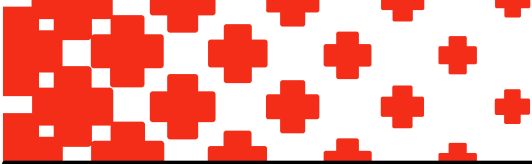




# Trust Questionnaire

Trust Name: \_\_\_\_\_





I have provided the following documents:



- Dividend Statement
- Bank Interest Certificate
- Any Trust minutes prepared during the year.
- Any gifting made to the trust.

**Any changes to Beneficiaries during the year? Include details below including date of the change:**


**Any changes to Trustees during the year? Include details below including date of the change:**


**Was there any taxable income distributed to any beneficiary that we do not complete an Income Tax Return for?**